e-MANAGEMENT PLATFORM: ACCOUNTABILITY AND TRANSPARENCY HUB FOR YOLANDA

(eMPATHY)

ANALYTICAL INTERFACE

USER MANUAL

Version 1.5

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1. INTRODUCTION

This document describes the *e-Management Platform: Accountability and Transparency Hub for Yolanda (eMPATHY)* developed for the Government of the Philippines. It provides the necessary instructions to ensure successful work with the application. Use of this document and compliance with the standards specified herein is mandatory for anyone working with the mentioned application.

2. OVERVIEW

e-Management Platform: Accountability and Transparency Hub for Yolanda (eMPATHY) is a web-based aid management information system which is designed to facilitate monitoring and evaluation of the reconstruction assistance received by the Government of the Philippines due to the quick response and pledging of financial assistance from foreign countries and international organisations after Typhoon Yolanda (internationally referred to as Haiyan) struck the country. It is also a powerful and effective mechanism for providing and sharing information on post-disaster related activities among the program and project stakeholders, including government implementing agencies at the national and local government levels, non-governmental organisations, private sector companies, funding agencies, beneficiary communities and clusters, and other interested groups.

The main objective of *eMPATHY* is to enhance transparency and accountability in managing assistance that responds to the country's recovery and reconstruction priorities and goals. It also aims at serving as an open data visualization platform for transparent, accurate, and timely disclosure of information for evidence based decision making. Moreover, *eMPATHY* helps to build trust and confidence between communities and the authorities in the difficult post-disaster response situation as it allows tracking finances, including both internal and external assistance, as well as progress of both on and off budget recovery activities on the ground.

eMPATHY is designed to provide quick access to project monitoring and evaluation data remotely via Internet. Once you have accessed this application, you can view the data organised into lists, charts, maps, and reports; present the data in the form of different analytical reports, memorize/save the reports, print them, and export them into PDF, MS Word and MS Excel format files.

In the current design, *eMPATHY* consists of the following applications:

- **Projects** – this application is designed to view projects that are implemented in the country within the framework of the Yolanda recovery and reconstruction activities. In this application, you can track the project implementation as well present the project data in the forms of different analytical reports in the *List*, *Chart*, *Map*, and *Report* modules.

- **Indicators** – this application is designed to track the indicators that are used to measure the project progress towards the goals set. In this application, you can

view indicator details and present the data in the forms of different analytical reports in the *List, Chart, Map,* and *Report* modules.

- **Profiles** – this application is designed to display the profile information for the organisations and clusters used in the projects that are implemented in the country. In this application, you can view the organisation and cluster details as well as present the data in the forms of different analytical reports in the *List*, *Chart*, *Map*, and *Report* modules.

All applications available in *eMPATHY* contain a built-in online data entry sub-system, which is designed to allow entering or modifying relevant information remotely via Internet.

eMPATHY provides a web-based user interface and requires a web browser pre-installed.

3. WHO USES eMPATHY?

The table below lists the groups of users that might be accessing and managing the *eMPATHY* application:

	Role	Responsibility / Action
1	System Administrator	• Ability to manage system users and user permissions. • Ability to manage classifiers in all drop-down lists. • Ability to administer access rights to all data entry forms in the system. • Ability to submit draft projects. • Can use all available analytical tools for generating and downloading reports.
2	Data Administrator	• Ability to add, edit, delete project drafts. • Ability to submit draft projects. • Ability to add comments under each project activity. • Ability to add, edit, delete indicators. • Ability to edit organisation and cluster profiles. • Can use all available analytical tools for generating and downloading reports.
3	Data Entry User (Funding Agency/ Donor Focal Point)	• Ability to add, edit, delete project drafts. • Ability to edit activity progress information in submitted projects. • Ability to edit corresponding organisation profile. • Can use all available analytical tools for generating and downloading reports.
4	Validator (OPARR regional)	• Access to project data in read-only mode. • Ability to add comments under each project activity. • Can use all available analytical tools for generating and downloading reports.
5	Public User	• Can use all available analytical tools for generating and downloading reports.

For each user group, a specific role is assigned by the *eMPATHY* system administrator in full compliance with the requirements. Depending on the role, users get certain permissions to add, edit, modify, and view entries in the *eMPATHY* application.

Note: If you do not have enough permission to perform certain actions, please contact your project coordinator or system administrator.

4. LOGGING INTO eMPATHY

The starting screen of the *eMPATHY* application is the *Login Screen* (Figure 1). To log in, you should validate yourself with the username and password and then click the **Login** button.

Note: The password is case sensitive.

Note: If you have failed to log in several times, the system will be blocked. Contact your system administrator in order to unlock your user access. The number of unsuccessful login attempts is configured from the Administration Center (see *eMPATHY Administration Center User Manual* in REFERENCES).

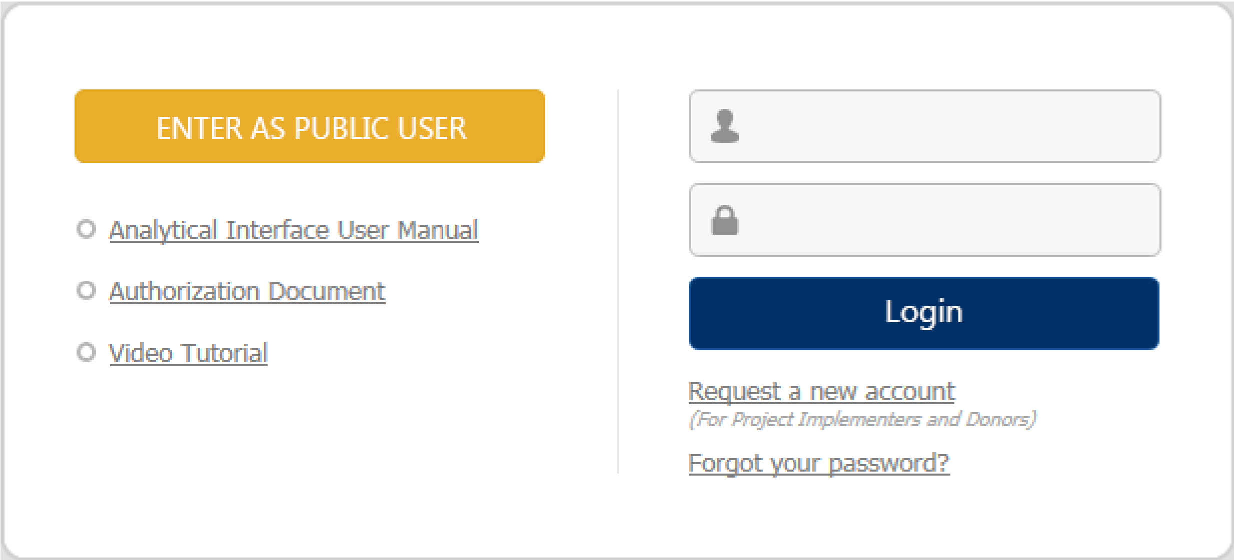


Figure 1: eMPATHY Login Screen

A successful login directs you to the *List* module.

Note: If you have forgotten your password, you can retrieve it by clicking the **Forgot your password?** link in the *Login Screen* and confirming your identity. After submitting your identity information, you will receive a password to the e-mail account indicated.

4.1 Registering a New User

If you are a project implementer or donor and you are new to the system, you need a personal account to be able to work with the application. To request an account, you have to sign up for a username and password.

In order to register in the system, follow the steps below:

1. Click the **Request a new account** link in the *Login Screen*. A *User Registration Form* (Figure 2) appears.
2. Fill in the information requested.
3. Click the **Submit** button to submit the inserted information.

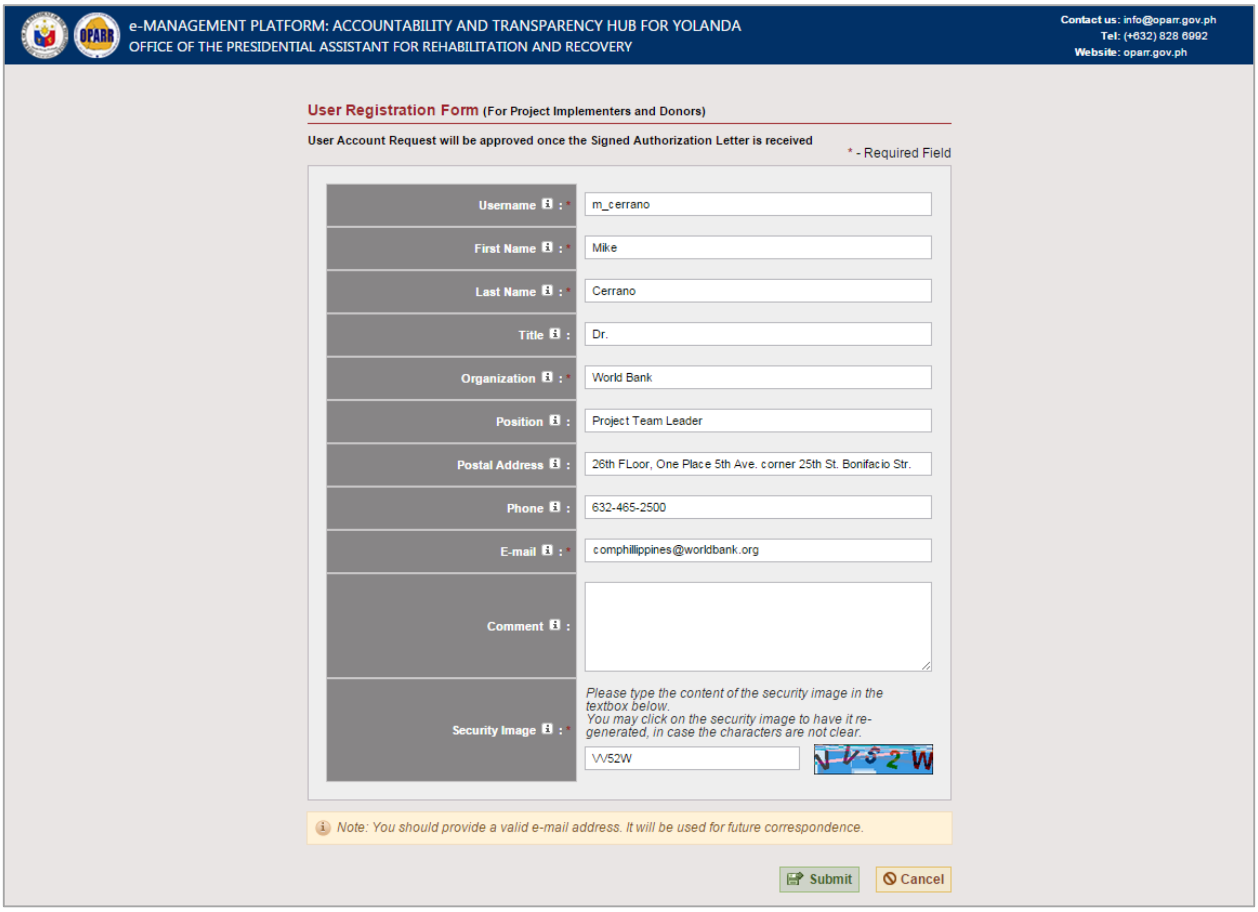


Figure 2: User Registration Form

Once you submit the registration form, the *eMPATHY* administrator receives a notification. The administrator will review the information submitted and either approve the application or reject it. Please note that user account requests are approved and processed upon the receipt of a signed Authorization Letter from the system administrator.

In case the application is approved, you will receive an e-mail message to the provided e-mail address. The e-mail will contain your login information details (username and automatically generated password).

Once logged in with the received username/password, you can manage your details, i.e. change personal data and the password. To edit personal details, log into the application, go to the *My Profile* section (Figure 3) and make the appropriate changes.

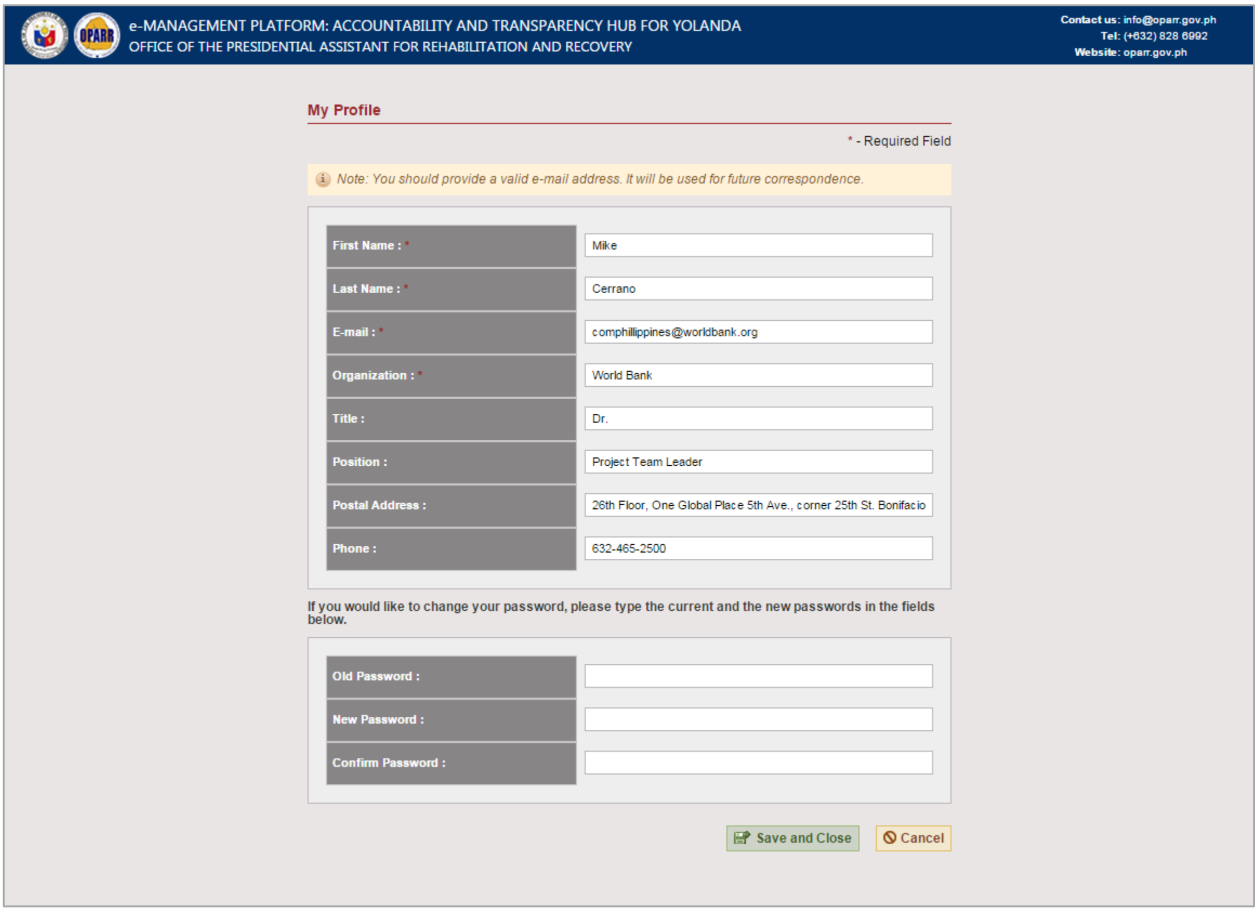


Figure 3: My Profile Section

4.2 Accessing eMPATHY without Registration

To ensure more flexibility and to provide access to a wider range of users, the system is designed in such a way that it allows public users to enter it without registration.

Public users wishing to view data should click the **ENTER AS PUBLIC USER** in the *Login Screen* (Figure 1). They will be directed to the *List* module of the application.

5. eMPATHY ANALYTICAL INTERFACE STRUCTURE

eMPATHY consists of the following main sections:

- MY PORTFOLIO MODULE – used for quick access to the projects that the current user has permissions to manage.
- DASHBOARD MODULE – used for quick access to the reports registered in the *eMPATHY* system.
- LIST MODULE – used to create and execute ad-hoc queries on the data and acquire results in the form of a list.
- CHART MODULE – used to filter and display the data in a chart form.
- MAP MODULE – used to filter and display the data in a map form.
- REPORT MODULE – used to generate complex reports over one or more criteria and present the output in the printable and user-friendly format.

The *eMPATHY* main window has a complex preview as it is shown in Figure 4.

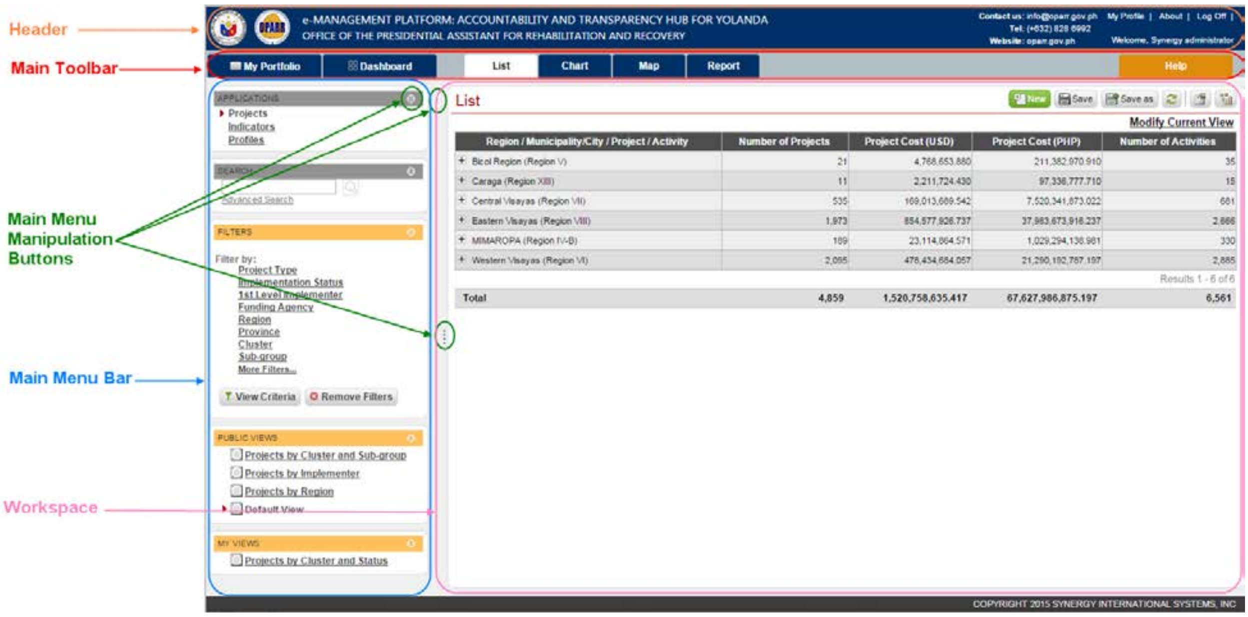


Figure 4: eMPATHY Analytical Interface Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains the application name and the *eMPATHY* logo. On the right side, the following functions are available: • **Contact us** – contact details (e-mail address, phone number, and website) of the *eMPATHY* System Administrator. • **My Profile** – this opens your personal settings and details. For details, see Registering a New User. • **About** – opens the *eMPATHY* information window. • **Log Off** – this button is used to log off the application.

Main Toolbar	This is the main toolbar of the *eMPATHY* application. The following tabs are available here: • **My Portfolio** – opens the MY PORTFOLIO MODULE to manage user specific projects. • **Dashboard** – opens the DASHBOARD MODULE for quick access to the reports registered in the *eMPATHY* application. • **List** – opens the LIST MODULE. • **Chart** –opens the CHART MODULE. • **Map** – opens the MAP MODULE. • **Report** – opens the REPORT MODULE. • **Help** – opens the *eMPATHY* application help.
Main Menu Bar	This menu contains sections with main functions of the *eMPATHY* application: • **Applications** – lists all applications present in *eMPATHY*. • **Search** – contains a common and advanced search functions among the selected application list. For details, see SEARCH. • **Filters** – contains filtering options. For details, see FILTERING. • **Public Views/Charts/Maps/Reports** – memorized views / charts / maps / reports (depending on the opened module) available to all users of the application. • **My Views/Charts/Maps/Reports** – memorized views / charts / maps / reports (depending on the opened module) created by and available to the current user only.
Main Menu Manipulation Buttons	• **Left/Right arrows** ( ) – used to hide/open the Main Menu bar. • **Up/Down arrows** ( ) – used to collapse/expand the section in the Main Menu bar. • **Frame Divider** ( ) – used to adjust the width of the Main Menu bar.
Workspace	In this frame, all applications and modules are managed. Here are filtering and search results displayed.

6. MY PORTFOLIO MODULE

The *My Portfolio* module of the *eMPATHY* application (Figure 5) provides quick access to the project records that the current user has been granted with permissions to manage.

In order to access the *My Portfolio* module, click the **My Portfolio** tab in the *Main Menu* of the *eMPATHY* application (see eMPATHY ANALYTICAL INTERFACE STRUCTURE). Editing permissions for records in *My Portfolio* can be based on the user (whether the user has created the record) or user's group (whether someone from the group the user belongs to has created the record). All these permissions are granted and managed from the eMPATHY Administration Center (see *eMPATHY Administration Center User Manual* in REFERENCES).

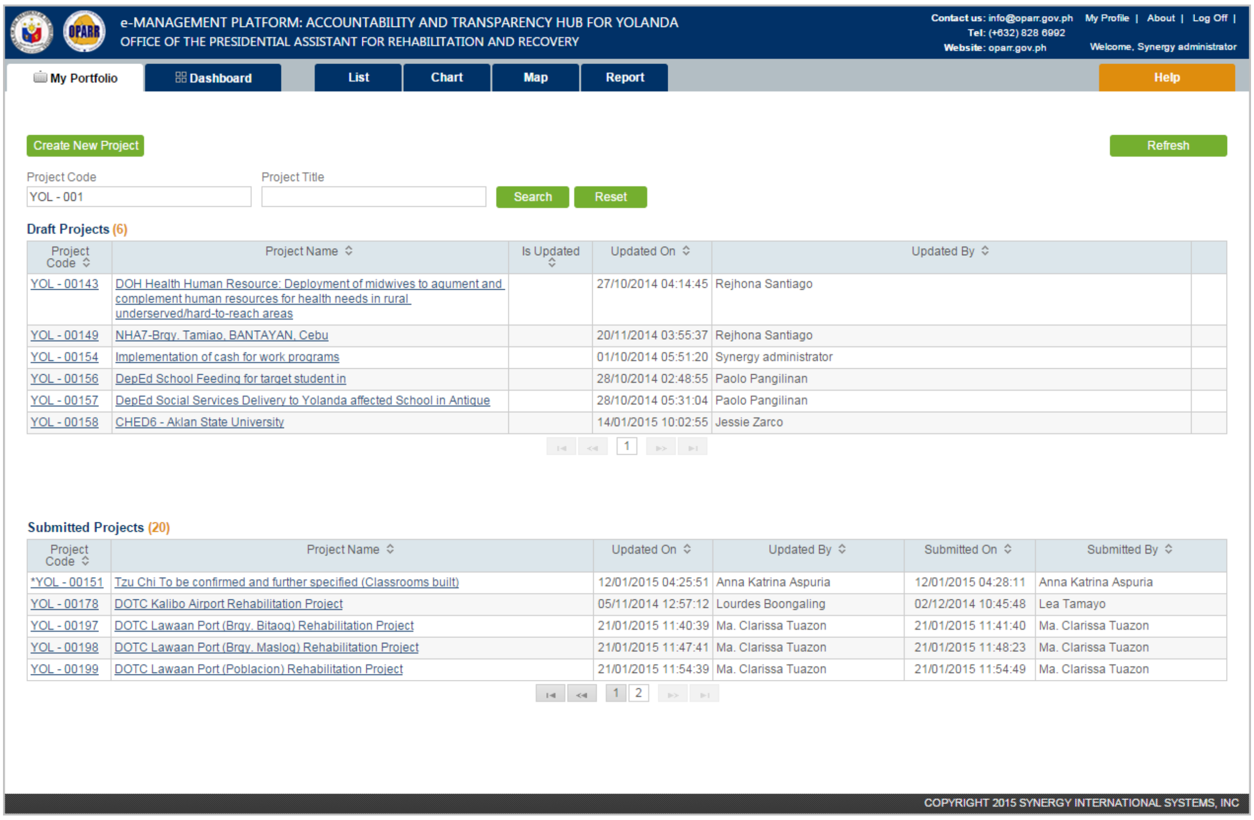


Figure 5: My Portfolio Module

In the *My Portfolio* module of the *eMPATHY* application, you may see a list of draft and submitted projects. Each project created in *eMPATHY* should get submitted first in order to become public and official. Below is the procedure of project submission:

- A user adds a project. It is saved as a draft in the user's portfolio, in the *Draft Projects* section. Drafts may also be viewed and edited by others users who have the corresponding permissions.
- If all mandatory fields are filled in the project form, then the draft is ready for submission.
- To submit a draft, press the **Submit** button ( ) in the *Draft Projects* table. Please note that only data and system administrators can submit a project. Therefore, the **Submit** button is not available to other roles (e.g. data entry users) involved in the *eMPATHY* project.

Note: Only submitted drafts are displayed in the *List* table (see LIST MODULE) and available for analytics and reporting in the *eMPATHY* application.

The information displayed in the *My Portfolio* module for each draft project includes the following:

- **Project Code** – this is a unique code assigned to the project for identification and future reference;
- **Project Name** – this is the name of the project;
- **Is Updated** – this displays if the project details (e.g. revised target, progress, or expenditures) are updated by the corresponding user (see WHO USES eMPATHY?) within a specified period of time or the user has added additional comments about the project.

  Note: Updated ongoing projects have the ✔ sign displayed for them in this column.
- **Updated On** – this is the date when the project was last updated;
- **Updated By** – this is the name of the user who last updated the project.

The information displayed in the *My Portfolio* module for each submitted project includes the following:

- **Project Code** – this is a unique code assigned to the project for identification and future reference;
- **Project Name** – this is the name of the project;
- **Updated On** – this is the date when the project was last updated;
- **Updated By** – this is the name of the user who last updated the project;
- **Submitted On** – this is the date when the project was submitted;
- **Submitted By** – this is the name of the user who submitted the project.

In the *My Portfolio* module, a project may be created; details of the existing project can be viewed. Moreover, it is possible to browse projects and sort them in ascending or descending order according to definite criteria.

6.1 Creating a New Project

In order to create a new project in the *My Portfolio* module, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the **Create New Project** button (Figure 6). This will open a *Project* form which is described in *eMPATHY Projects Application User Manual*, see REFERENCES.

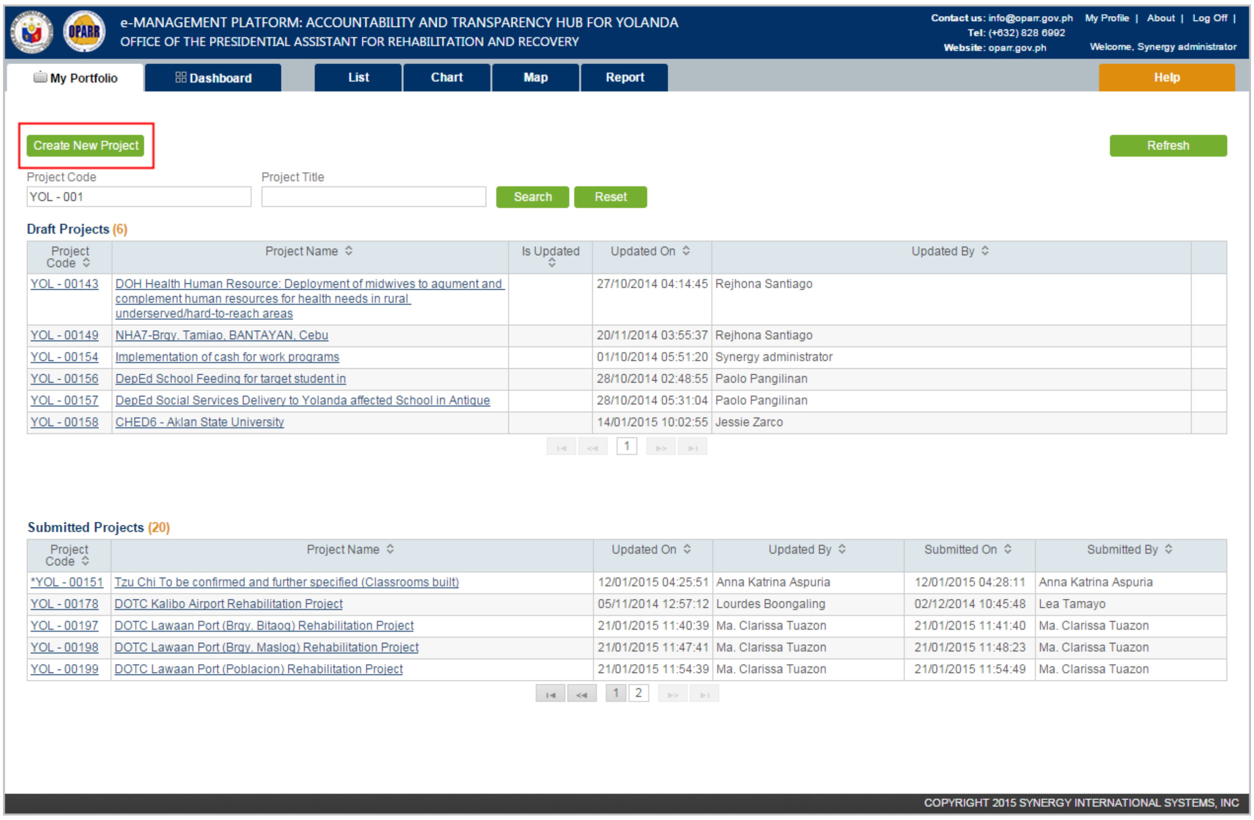


Figure 6: Adding a New Project

6.2 *Viewing Project Details*

In order to view the details of projects in the *My Portfolio* module, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the project that you want to see the details for. You will be directed to the *Details* section where the project data will be displayed. For more information, see DETAILS SECTION.

6.3 *Searching Projects*

The *My Portfolio* module can contain almost unlimited number of projects. So, the main challenge of working in this module becomes the ability of locating the required project easily and quickly. This is the reason why the module has been enhanced with a comprehensive search mechanism that allows locating the project you are looking for within a mere fraction of time.

The search option is intended for locating projects instantly and easily. It implies acquiring the search results based on filtering criteria. The results returned will display all matches to the query.

The following filters are available in the *My Portfolio* module:

- **Project Code** - filters the list of projects by a unique identification code assigned to the project.
- **Project Title** - filters the list by the project name or any part of it.

In order to search for a project, follow the steps below:

1. Go to the **My Portfolio** module.
2. Select the filtering criteria that apply.
3. Click the **Search** button (Figure 7). The results will display only the tasks that match the search parameters.

Note: To clear the filter and roll back to the entire list of projects, you will have to click the **Reset** button.

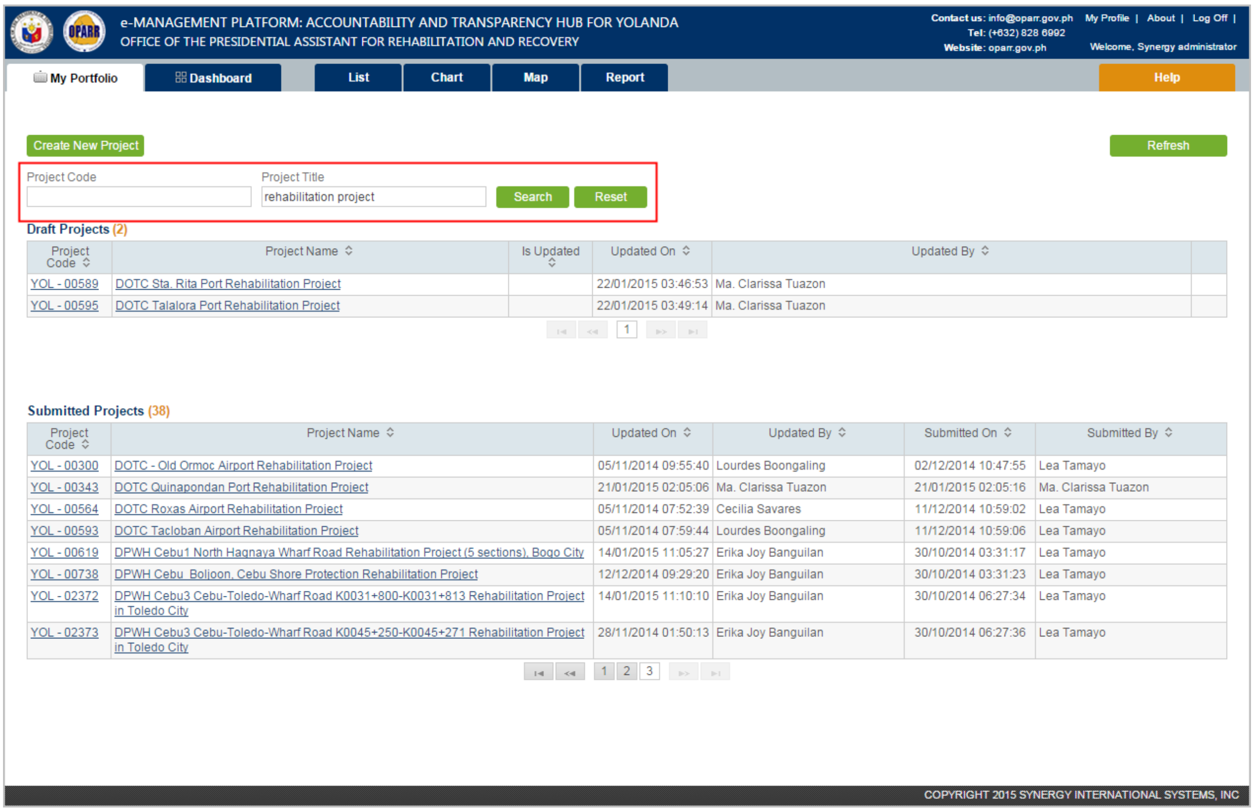


Figure 7: Searching for a Project

6.4 Sorting Projects

The projects displayed in the *My Portfolio* module can be sorted in ascending or descending order according to one of the following criteria:

- **Project Code** – the projects will be sorted in numerical order according to the code that they have been assigned.
- **Project Name**– the projects will be sorted in alphabetical order according to the project name.
- **Is Updated** – the projects will be sorted according to the update status.
- **Updated On** – the projects will be sorted in chronological order according to the date when they were last updated.
- **Updated By** – the projects will be sorted in alphabetical order according to the user who last updated the project.
- **Submitted on -** the projects will be sorted in chronological order according to the date when they were submitted.
- **Submitted By** – the projects will be sorted in alphabetical order according to the user who submitted the project.

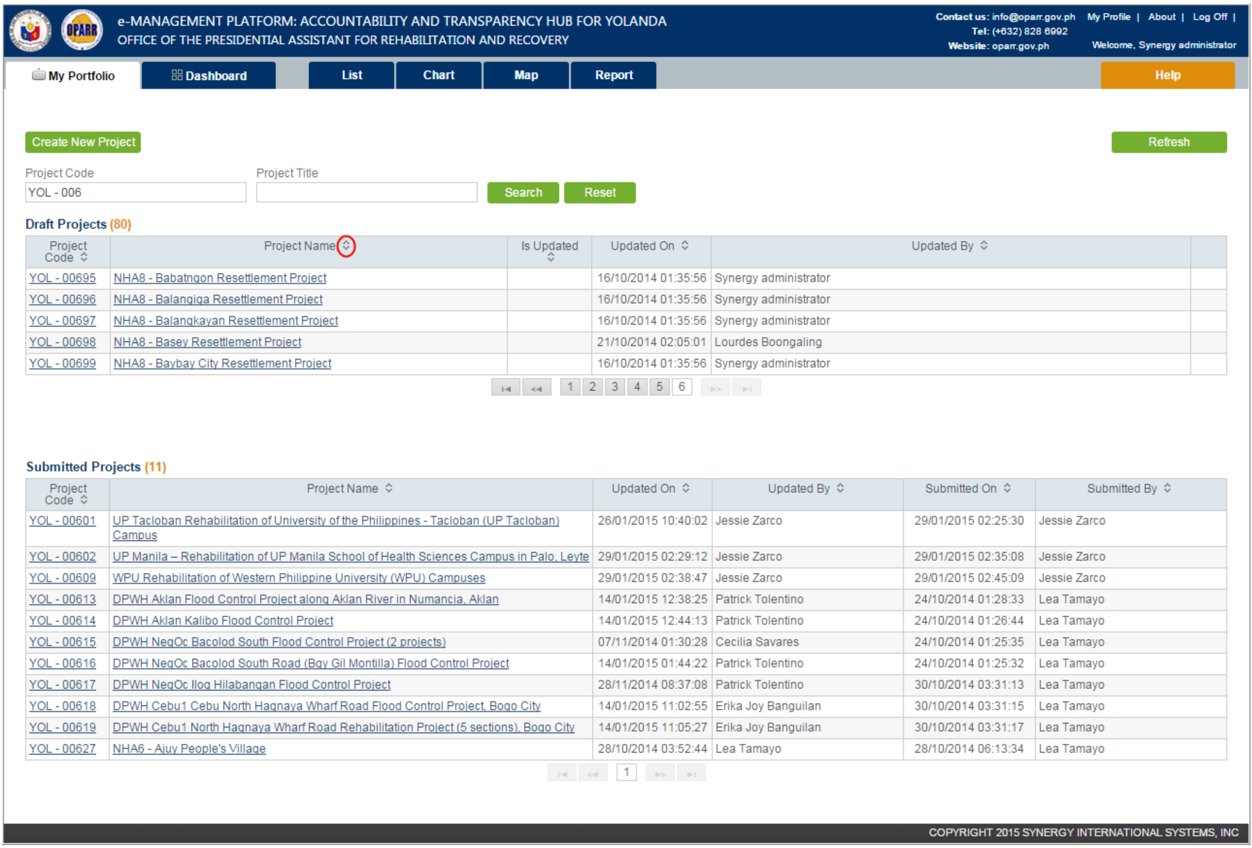


Figure 8: Sorting the Projects

In order to sort the projects according to one of the criteria described above, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the arrow icon in the header of the column that you want to sort the projects by (Figure 8).
3. Click the arrow icon once again to sort the projects in reverse order.

6.5 Refreshing the Data

For decision-makers, it is very important to have access to the latest data available. This is why the *My Portfolio* module has been enhanced with the mechanism that allows loading the most recent data from the database and incorporating them in the view currently on display. This way, the decision-makers and other stakeholders will have at-a-glance perspective into the data for more informed and efficient decision-making.

In order to load the latest data available, click the **Refresh** button in the top toolbar of the report screen (Figure 9). The view that is currently displayed on the screen will be updated with the most recent data.

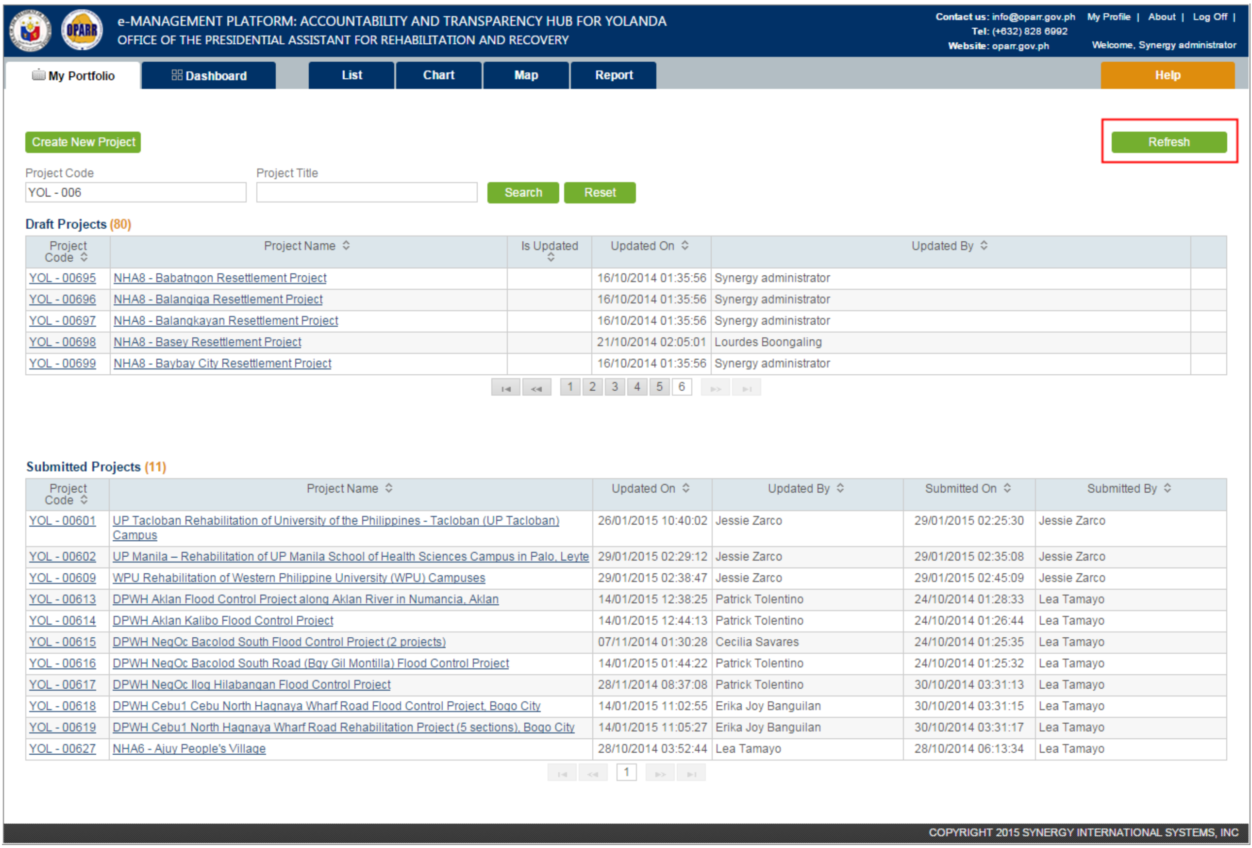


Figure 9: Refreshing the Data

7. DASHBOARD MODULE

The *Dashboard* module of the *eMPATHY* application serves as a powerful decision support tool for high-level executives by providing a completely personalized workspace with one-click access to up-to-date information on project data included in the memorized reports, lists, charts, and maps. This module fulfills the information needs of project managers and executive level decision-makers that require seeing an aggregate summary of the information available in the system in various formats, simultaneously, in one screen. Dashboards are a convenient way to display data analytics in lists, maps, charts, and reports and use the flexible previews during presentations, meetings, and conferences.

The *Dashboard* module allows creating new informative dashboards, customizing the existing dashboards, adding new items to them, renaming and saving the dashboards and updating the data that are shown.

7.1 Key Features

You can make use of the following key features of the *Dashboard* tool in *eMPATHY*:

- ✓ An intuitive drag-and-drop environment that turns adding reports to a dashboard into an easily manageable task.
- ✓ Fully resizable report windows.
- ✓ Better visualization of the information presented in graph reports.
- ✓ The ability to print reports for future reference.
- ✓ The ability to export reports on the dashboard in MS Word, MS Excel, and Adobe PDF formats.

7.2 Accessing the Dashboard Module

In order to access the *Dashboard* module of the system, you should click the **Dashboard** tab. This will navigate you to the *Dashboard* module. In this module, you can create dashboards, include reports under them, etc.

7.3 Main Screen and Its Components

- **Dashboard Selector -** contains a list of pre-defined dashboards. By choosing a definite dashboard from this list, you can view the reports stored in the selected dashboard.

- **Customise -** allows performing the following operations:
    - ***Name* -** displays the dashboard name.
    - ***Save* -** saves a dashboard so that it can be shared with other users.
    - ***Save as New* -** saves a dashboard as a new one. This option is especially useful if you need to make modifications in a definite dashboard while keeping the source information intact. This way overwriting of the original dashboard is prevented.
    - ***Remove* -** deletes a dashboard together with its contents.

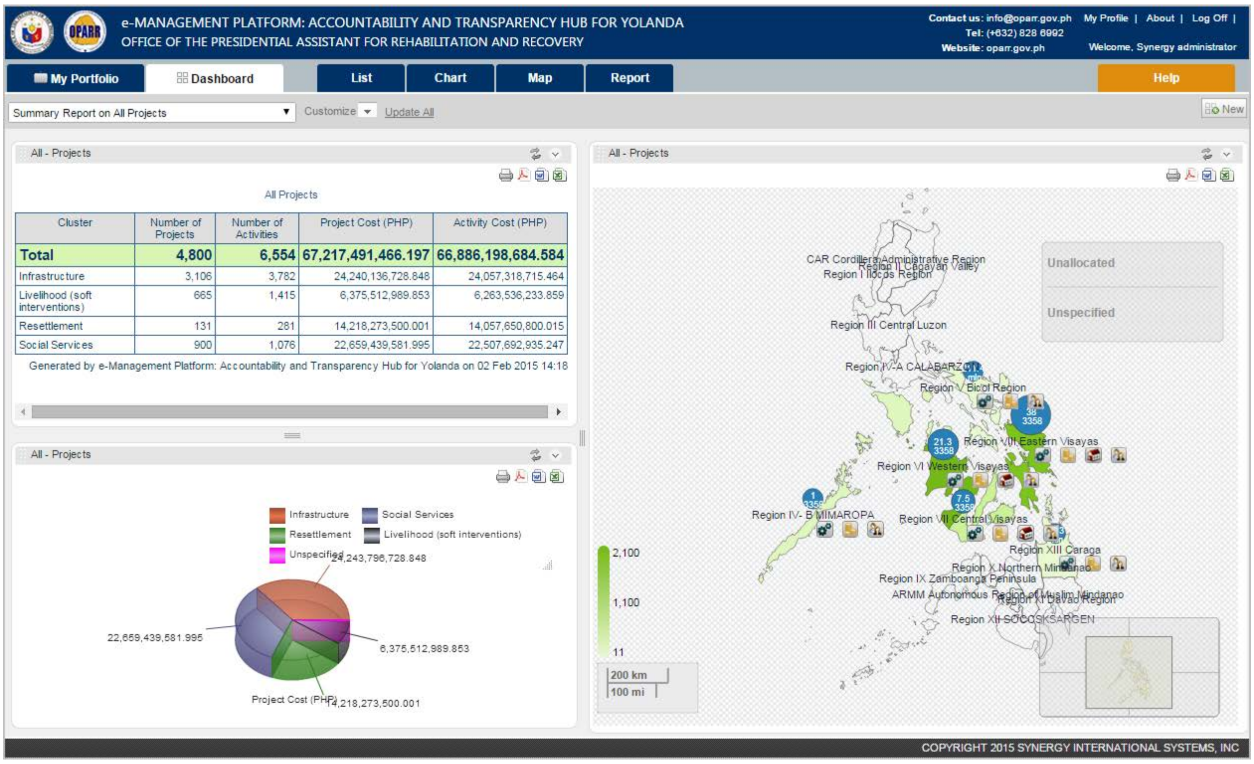
- o ***Cancel -*** discards the modifications made to the dashboard currently displayed on the screen.
- o ***Public –*** makes the dashboard available to other users as well if selected.
- o ***Scroll Mode*** – toggles the scrollbar thus allowing additional space for adding reports to the dashboard.

- **Update all -** loads the latest data from the database.

- **New -** creates a new dashboard.

- **Add New Item -** adds a new report under the definite dashboard from the list of all pre-defined reports previously created.

- **Dashboard Workspace -** the main screen of the *Dashboard* module where the content of a definite dashboard is viewed.



Cluster	Number of Projects	Number of Activities	Project Cost (PHP)	Activity Cost (PHP)
Total	4,800	6,554	67,217,491,466.197	66,886,198,684.584
Infrastructure	3,106	3,782	24,240,136,728.848	24,057,318,715.464
Livelihood (soft interventions)	665	1,415	6,375,512,989.853	6,263,536,233.859
Resettlement	131	281	14,218,273,500.001	14,057,650,800.015
Social Services	900	1,076	22,659,439,581.995	22,507,692,935.247

Figure 10: Dashboard Module

7.4 Dashboard Management

7.4.1 Create a New Dashboard

In order to create a new dashboard, follow the steps below:

1. Click the **New** button at the upper right corner of the screen (Figure 11). A new field will appear in the left part of the screen to give a name other than the default one to the dashboard and to save it. Also, the list of all existing pre-defined reports is used to add new items to the dashboard.

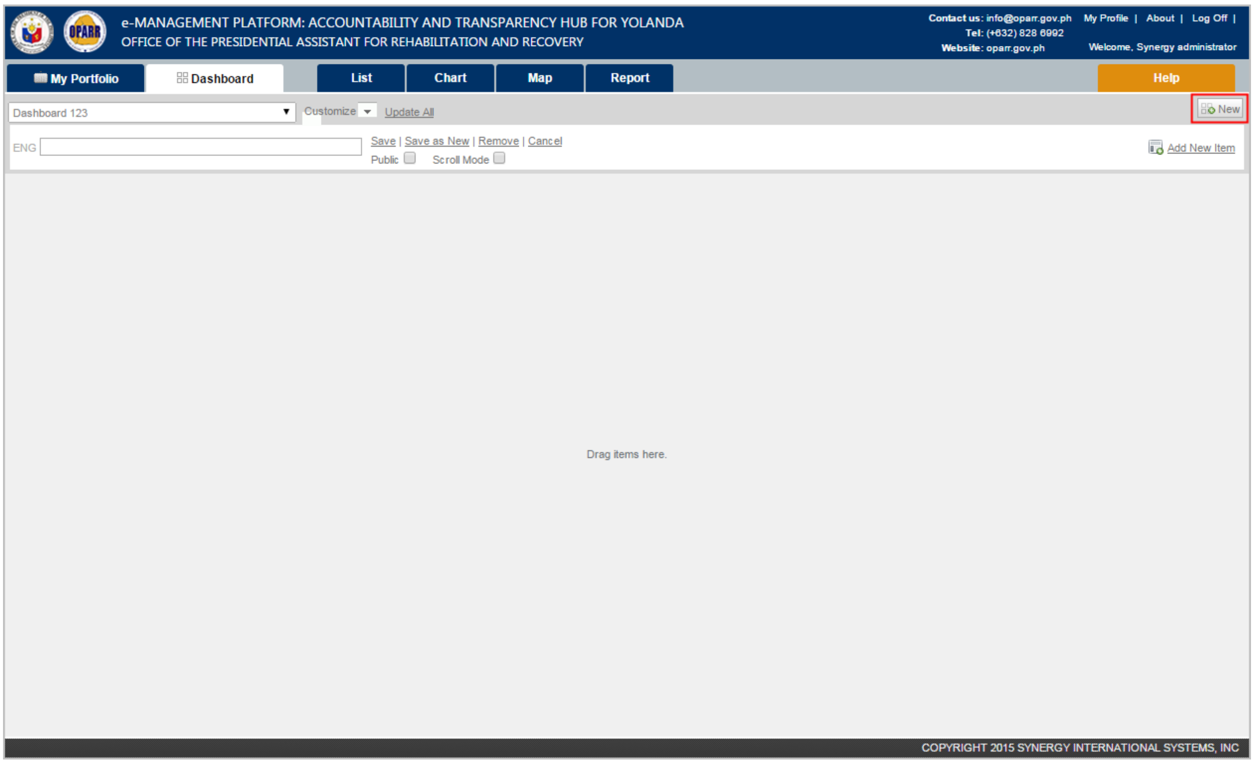


Figure 11: Adding a New Dashboard

2. Give the desired name to the dashboard.
3. Add reports to the dashboard, see Add an Item to a Dashboard.
4. Save it.

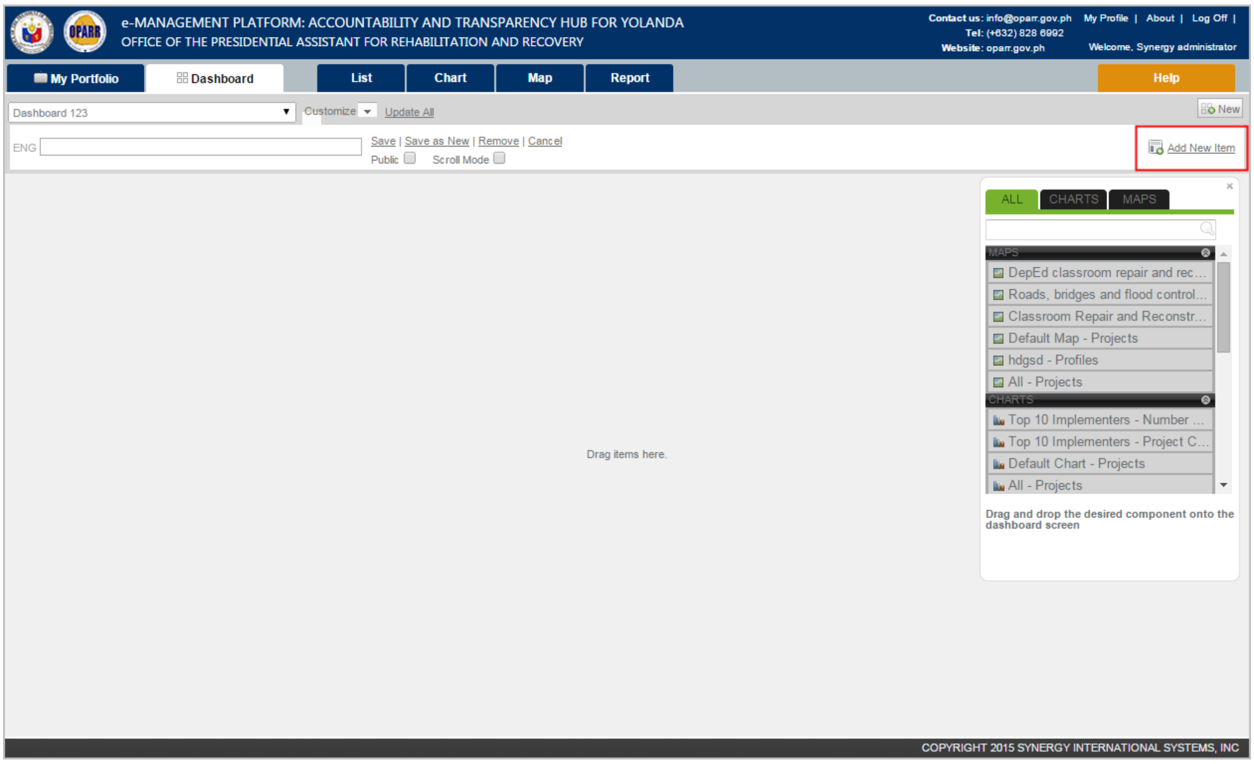


Figure 12: List of Pre-defined Reports

7.4.2 Add an Item to a Dashboard

In order to add a report to a dashboard, follow the steps described below:

1. Click the **Add New Item** link. The list of all previously saved reports will appear (Figure 12).
2. Select a report to add to a dashboard and drag-and-drop it onto the main screen.
   Note: If the list is long and hard to browse in, you can locate the respective report by entering the keyword in the search box above the list. All reports matching the search criteria will display.

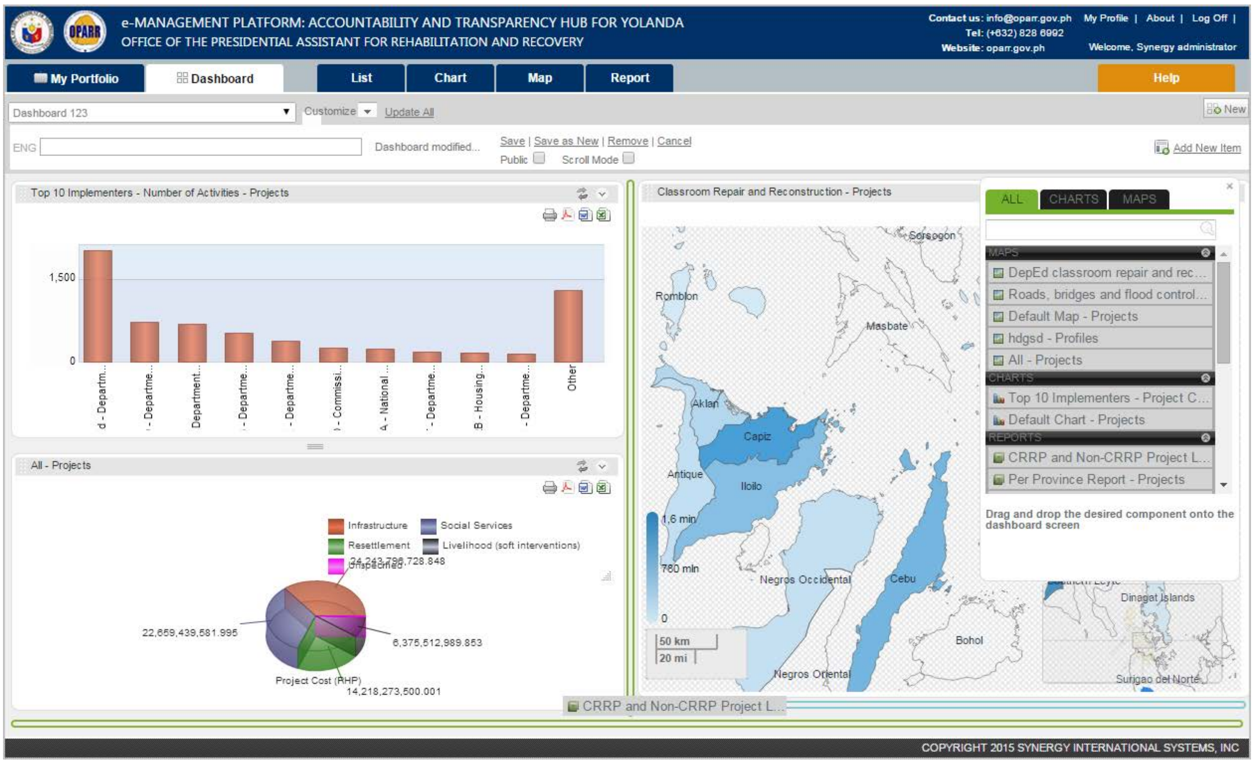


Figure 13: Adding a New Report

3. If you want to add another report to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new report can be placed. Keep the mouse button pressed until the green rectangle turns blue and release it (Figure 13).
   Note: You may add multiple reports to the dashboard.

Note: The reports can be arranged either in vertical or horizontal order. Once the place for the report is selected, it cannot be changed.

7.4.3 Edit a Dashboard Item

In order to edit a dashboard report, follow the steps below:

1. Select the dashboard the report of which you want to edit.
2. Select the **Edit** option from the actions menu in the top toolbar of the report screen. You will be directed to the analytical module where the selected report structure will be displayed.

Note: The selection of the analytical module will be determined by the type of the report that you want to edit. For example, if you select to edit a map report, you will be navigated to the *Map* module.

3. Make the necessary changes and save them.

7.4.4 Remove a Dashboard Item

In order to delete a dashboard report, follow the steps below:

1. Select the dashboard that you want to delete a report from.
2. Select the **Remove** option from the actions menu in the top toolbar of the report screen. The selected dashboard item will no longer display in the dashboard.

7.4.5 Print a Dashboard Item

In order to print a dashboard report, follow the steps below:

1. Select the dashboard the report of which you want to print.
2. Click the **(Print)** button in the top toolbar above the report screen. A separate window will open.
3. Select the **Print** option.

7.4.6 Export a Dashboard Item

In order to export a dashboard report in the PDF, MS Word and MS Excel formats, follow the steps below:

1. Select the dashboard the report of which you want to export.
2. Click the respective **(Export in PDF format)** / **(Export in MS Word format)** / **(Export in MS Excel format)** button in the top toolbar above the report screen. The respective report will be downloaded in the selected format on your local PC.

7.4.7 Customise a Dashboard

In the *Dashboard* module, you can customise any dashboard created, i.e. rename the dashboard, save the changes made to it, save a copy of the dashboard, delete a dashboard, and/or discard the changes made.

In order to customise a dashboard, follow the steps below:

1. Click the **Customise** button. A new section will appear displaying all customisation options in the *Dashboard* module (Figure 14).
2. Take the necessary action.
3. Save the changes.

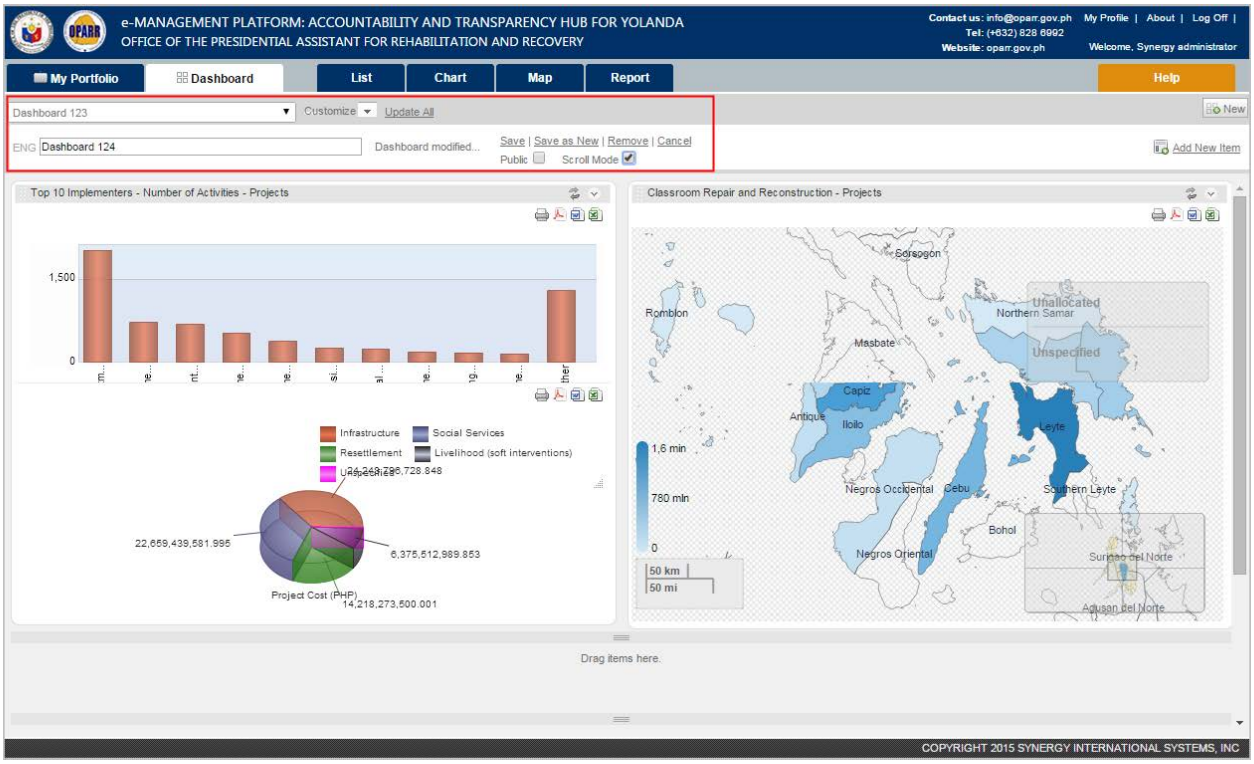


Figure 14: Customising a Dashboard

7.4.8 Save a Dashboard

After the new dashboard has been created and items added to it, it is necessary to save it to be able to view it later on. It should be mentioned that there are two options for saving dashboards:

- **Save**: saves all modifications made to the dashboard.
- **Save as New**: saves a copy of a dashboard under a new name.

In order to save a dashboard / a copy of a dashboard, follow the steps below:

1. Select the respective **Save** or **Save as New** option.
2. Click **OK** in the message window indicating the dashboard / the changes to it have successfully been saved.

7.4.9 Delete a Dashboard

In order to delete a dashboard, follow the steps below:

4. Select the dashboard that you want to delete. Its contents will be displayed on the main screen.
5. Click the **Remove** link. The selected dashboard will be deleted.

7.4.10 Discard the Changes

In order to discard the changes made to the dashboard currently displayed on the screen, follow the steps below:

1. Click the **Cancel** link.

2. Confirm that you want to discard all changes made to the dashboard by clicking **OK** in the warning message window that appears.

7.4.11 Update Data

For decision makers, it is very important to have access to the latest data available. This is why the *Dashboard* module allows you to update all reports included in various dashboards. In order to load the latest data from the database, select the **Update All** option.

If you want to update the data in an individual report, click the **Refresh** button in the top toolbar of the report screen. The latest data for the selected report will be loaded from the database.

8. LIST MODULE

In the *List* module (Figure 15) of the *eMPATHY* application, you can create and execute ad-hoc queries on the data and acquire the results in the form of a list.

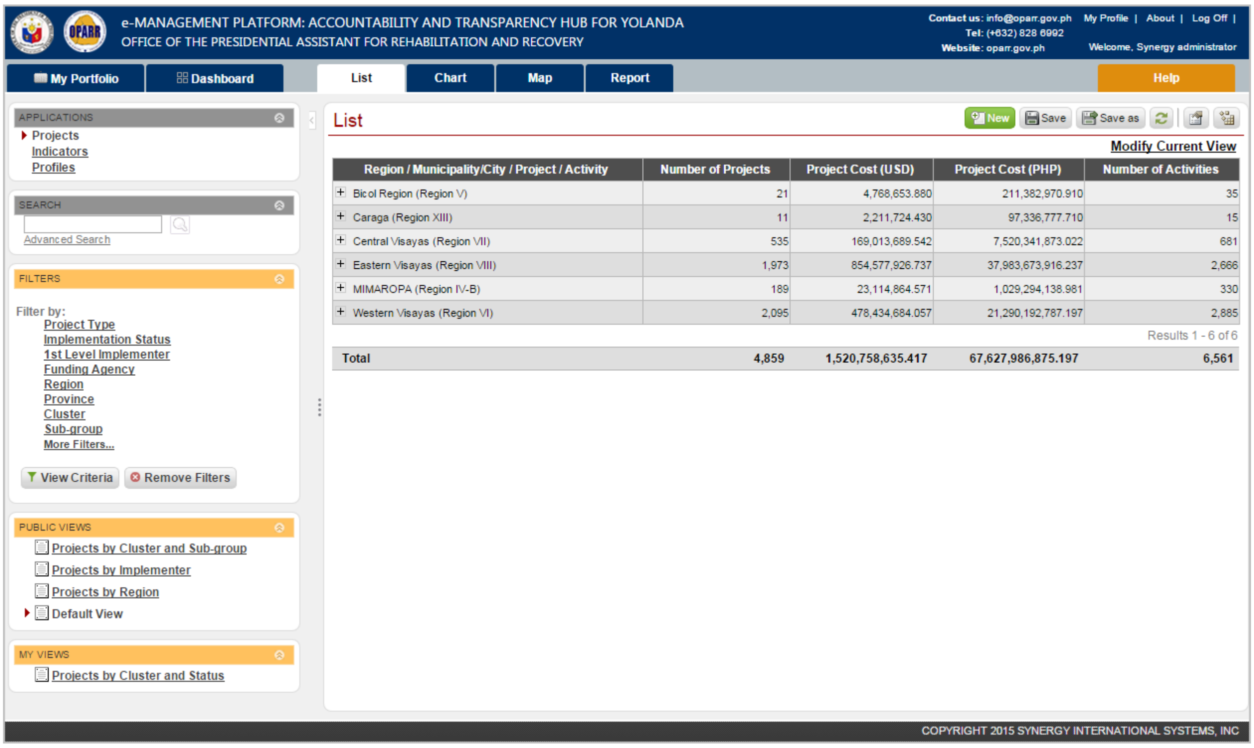


Figure 15: List Module

8.1 Accessing the List Module

A list consists of at least one group and one column, but the actual quantity of groups and columns is defined by the user's choice of view. Please see Modifying the Current View for more details on how to define groups / columns of a list.

In order to access the *List* module, click the **List** tab. You will be navigated to the *List* module. In this module, you can view data organised according to the selected groupings and columns, modify the currently used list, save it as a pre-defined report, include it under a definite group, etc.

8.2 Expanding the List Item

It is possible to expand the list item level to view the information of the sub-level(s). In order to expand the list item level, click the '+' sign next to the name of the list item. This will expand the list item group level displaying the first sub-level (Figure 16). This can further be expanded unless there are no more sub-levels to be displayed.

Note: You can expand only one group level at a time. If you expand the group level of another list item, the previously expanded group level will get collapsed.

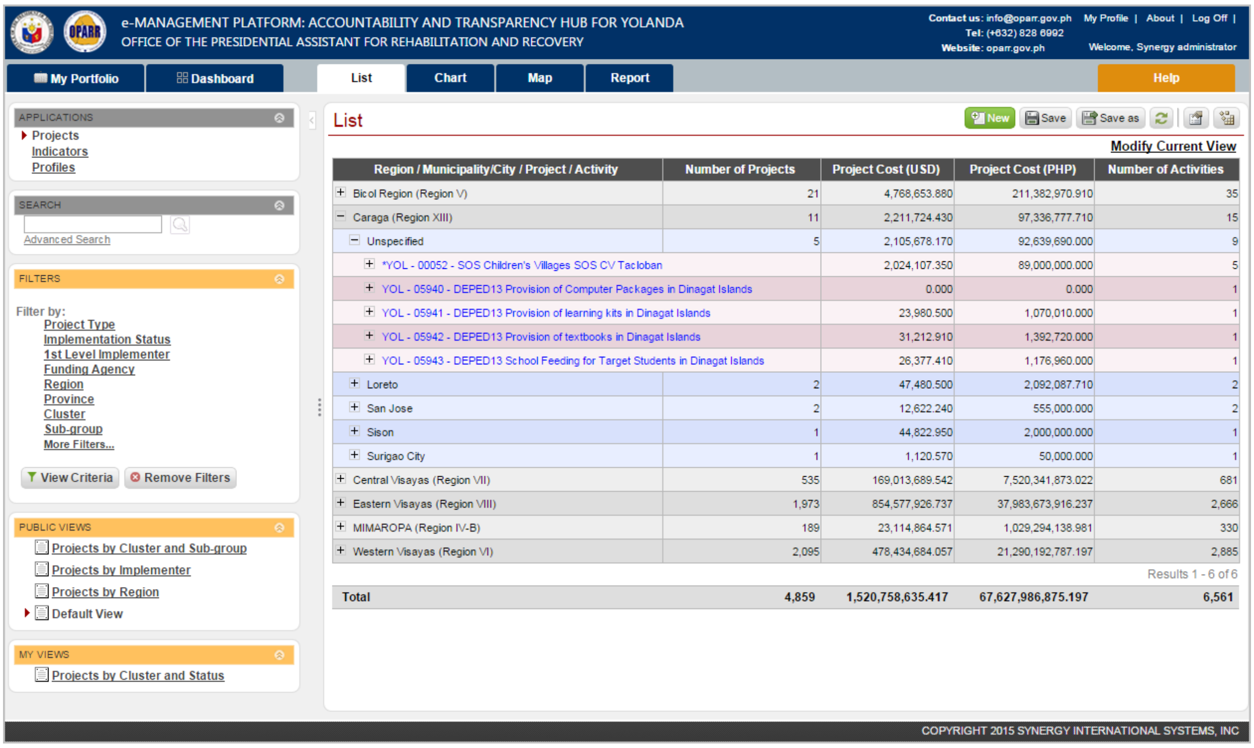


Figure 16: Expanding the List Item Level

8.3 *Sorting List Items*

You can sort the list view by column by clicking on the name of the column. This will sort the list alphabetically or numerically depending on the type of data entered into that column. The arrow that appears on the column can reverse the order of the list.

8.4 *Browsing among List Items*

You can browse among the list items by clicking the number link of the page you want to navigate to. The ⏮ **(First)**, ◀ **(Previous)**, ▶ **(Next)** and ⏭ **(Last)** buttons are used to navigate back and forth through the pages.

8.5 *Modifying the Current View*

It is possible to modify the list that is currently displayed in the *List* module. You can add new groupings to it or remove the selected ones, (un-) select columns, re-order them, etc. The steps described below provide for the necessary instructions for modifying the current view.

1. Click the **Modify Current View** link at the top right corner of the *List* screen. A *Modify Current View* window (Figure 17) will appear presenting the groupings/columns selected and available for the list view.
2. In the *Groupings* section, add / re-order / remove groups.
3. In the *Columns* section, add / re-order / remove columns.
4. In the *Cross Tab Groupings* section, define add / re-order / remove column groupings for the view.
5. After finishing making changes in the view, click the **Ok** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

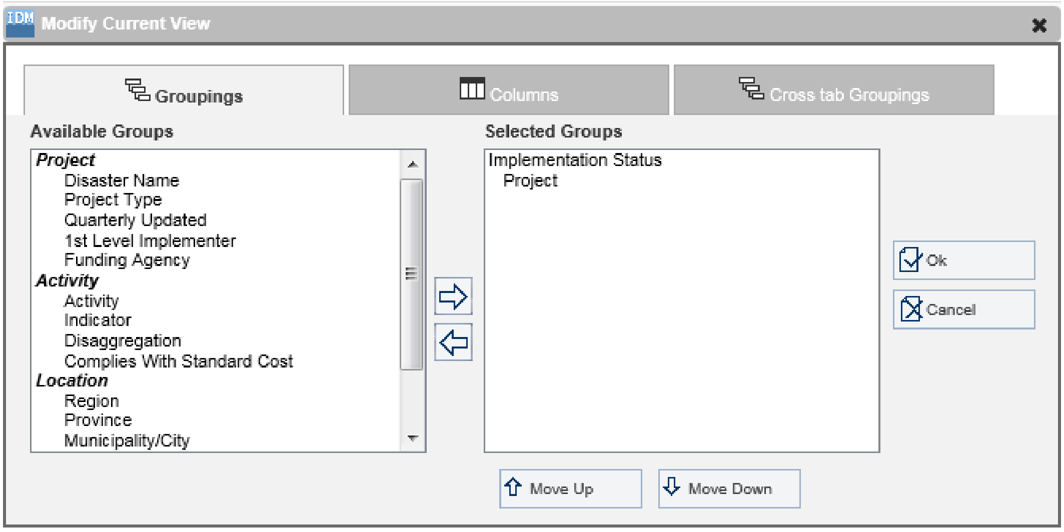


Figure 17: Modifying the Current View

8.5.1 Adding List Groups / Columns / Column Groupings

In order to add a group / column / column grouping to the list, follow the steps below:

1. In the *Available Groups / Columns* panel, select the group / column / column grouping to be added to the list.
   Note: It is possible to select several groups / columns by means of the **Shift** or **Ctrl** keyboard buttons.
2. Click the  **(Select)** button. The selected group(s) / column(s) will appear in the *Selected Groups / Columns* panel.

8.5.2 Re-ordering Groups / Columns / Column Groupings

In order to re-order the selected groups / columns / column groupings, follow the steps below:

1. Select the group / column / column grouping that needs to be re-ordered in the *Selected Groups / Columns* panel.
2. Click the **Move Up / Move Down** button.

8.5.3 Removing Groups / Columns / Column Groupings

In order to remove the selected groups / columns / column groupings from the list, follow the steps below:

1. In the *Selected Groups / Columns* panel, select the group / column / column grouping that needs to be removed from the list.
2. Click the  **(Unselect)** button. The selected group(s) / column(s) / column grouping(s) will be removed from the *Selected Groups / Columns* panel.

8.6 Sample Views

In the following chapters, you can see several samples on list reports.

8.6.1 Sample View 1

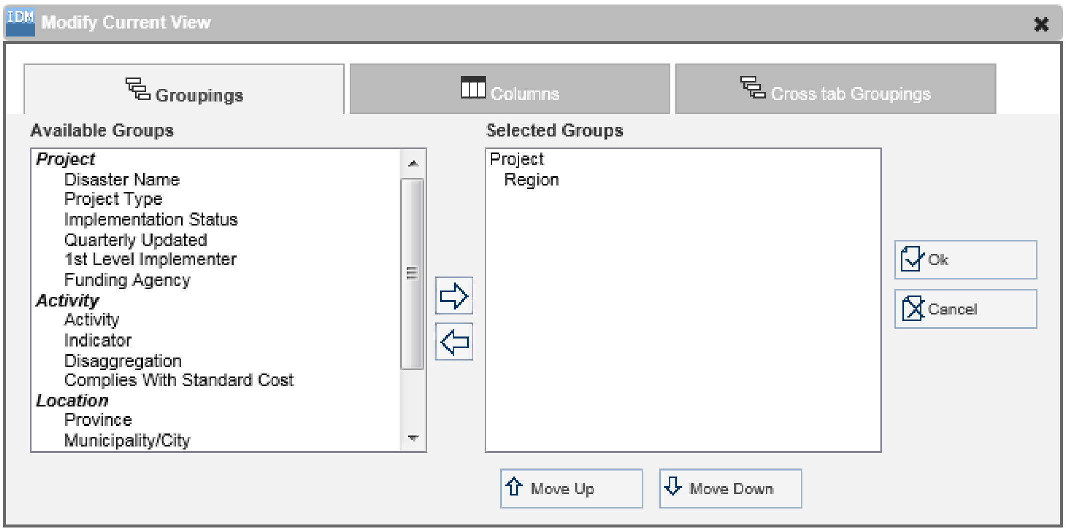


Figure 18: Defining List View Groupings for Sample View 1

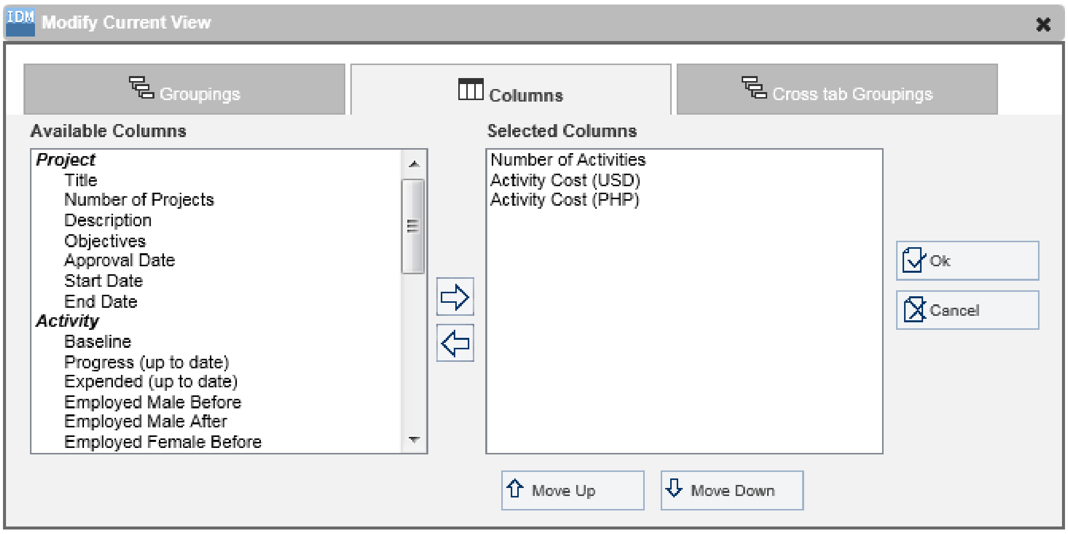


Figure 19: Defining List View Columns for Sample View 1

You will get the following result (Figure 20) if you have selected **Project** / **Region** hierarchy as a grouping (Figure 18) and **Number of Activities** / **Activity Cost (USD)** / **Activity Cost (PHP)** as columns (Figure 19).

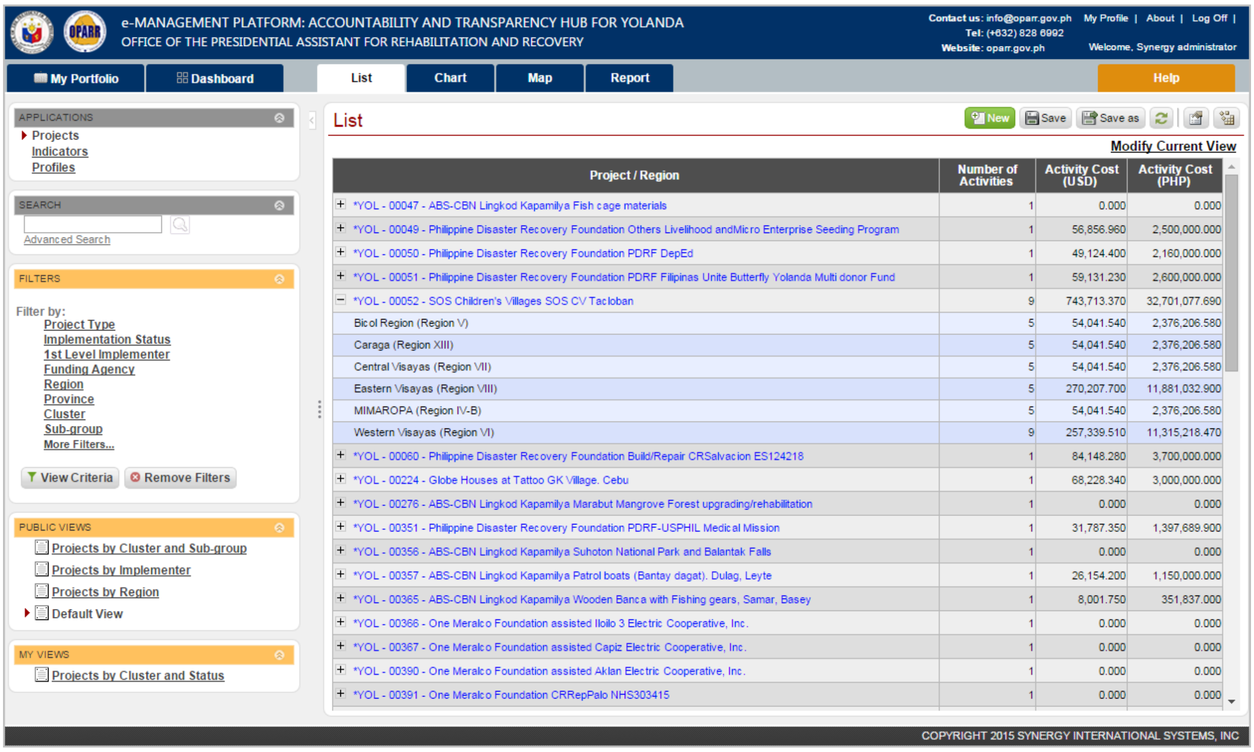


Figure 20: Sample View 1

8.6.2 Sample View 2

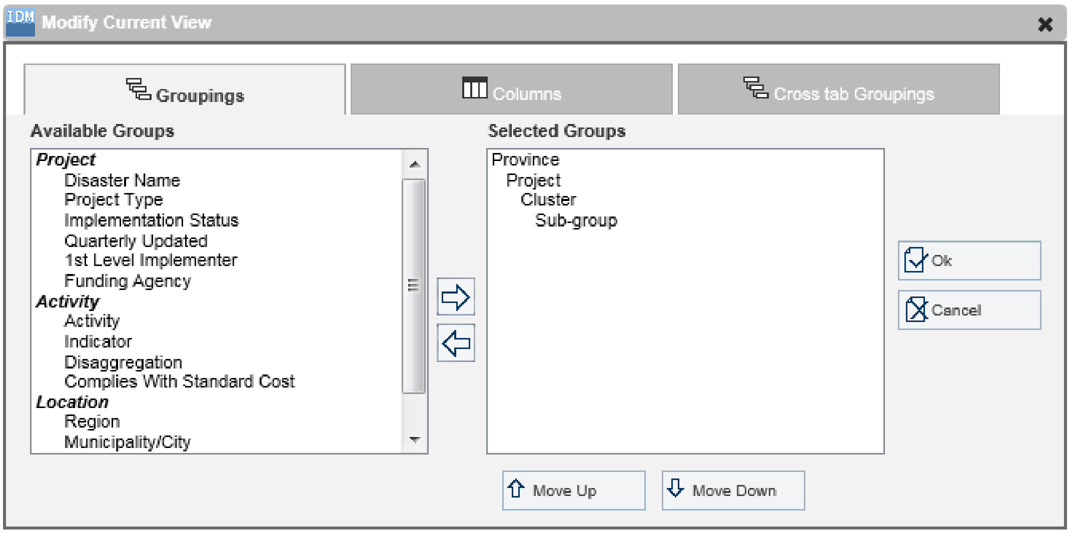


Figure 21: Defining List View Groupings for Sample View 2

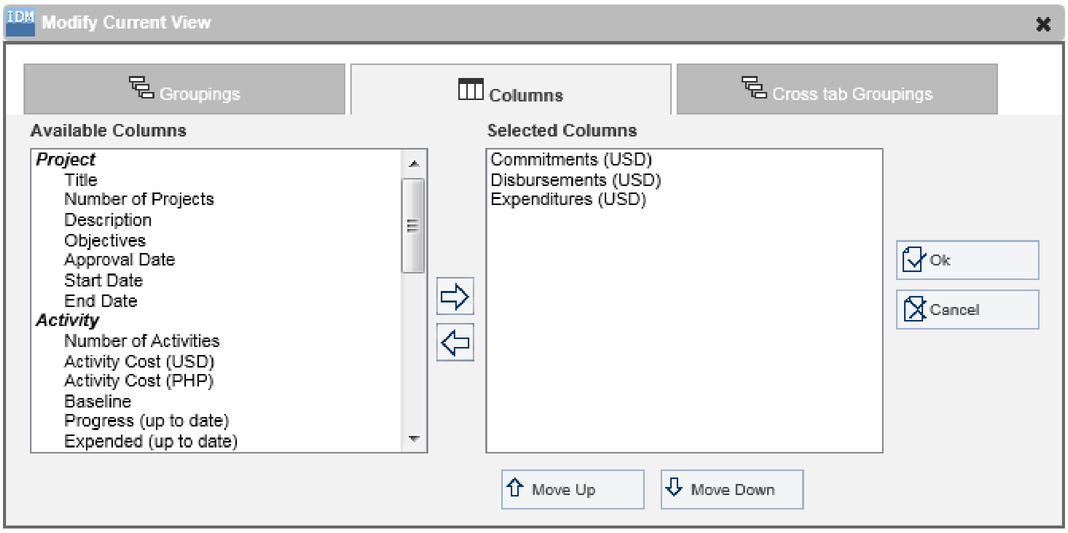


Figure 22: Defining List View Columns for Sample View 2

You will get the following result (Figure 23) if you have selected **Province** / **Project** / **Cluster** / **Sub-group** hierarchy as a grouping (Figure 21) and **Commitments (USD)** / **Disbursements (USD)** / **Expenditures (USD)** as columns (Figure 22).

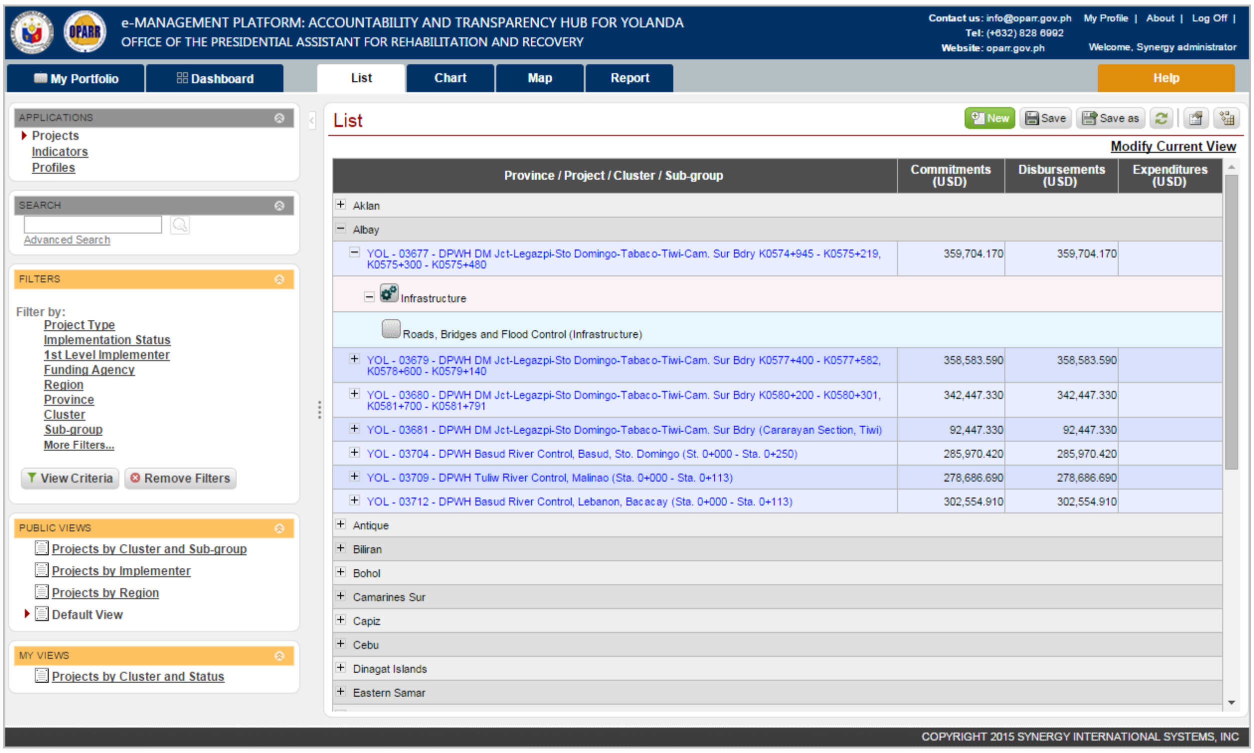


Figure 23: Sample View 2

9. CHART MODULE

The *eMPATHY* application is equipped with a powerful chart designer that empowers you with all necessary tools to create charts for professionally looking presentations and reports. A user-friendly interface, great number of visual effects and pre-defined chart types, flexible chart components selection, and on-screen real-time chart visualization make using the chart designer an easy and delightful experience.

9.1 Chart Module Key Features

You can make use of the following key features of the *Chart* tool in *eMPATHY*:

- ✓ Rich user interface that supports movable windows for arranging the screen as desired.
- ✓ The ability to resize the charts directly in the workspace.
- ✓ The ability to show or hide the data labels and legends.
- ✓ The ability to customise the coloring, or choose pattern-filled charts for black and white printing.

9.2 Accessing the Chart Module

As it has been stated above, the system provides for the opportunity to present data in the form of different charts. In order to access the *Chart* module of the system, click the **Chart** tab. The *Chart* module appears where a pre-defined chart is displayed.

9.3 Main Screen and Its Components

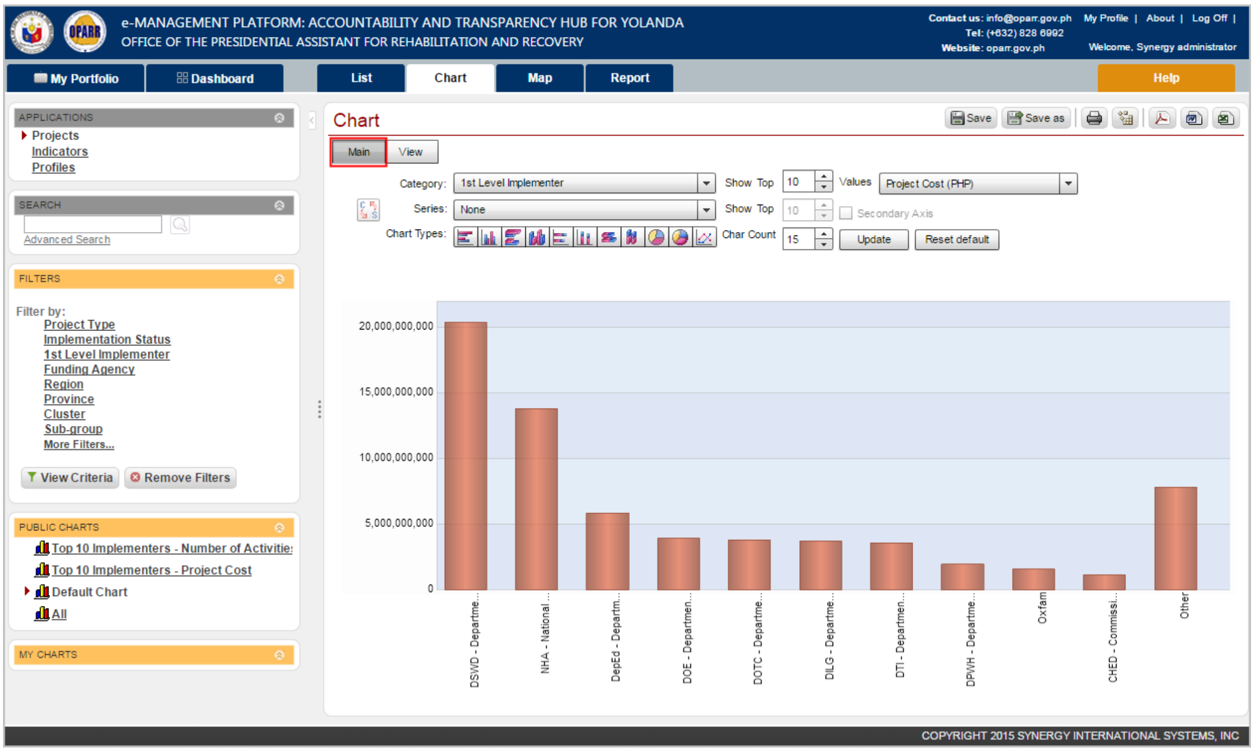


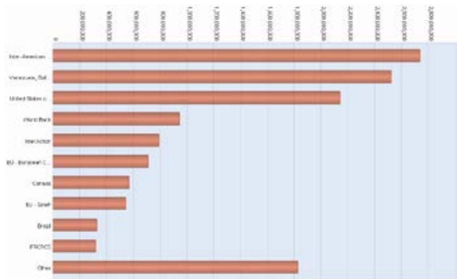
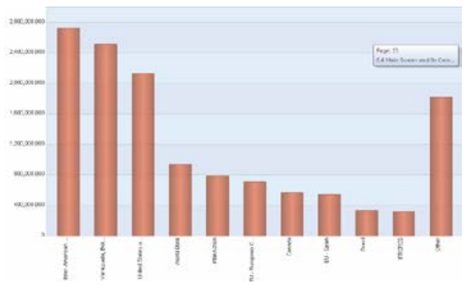
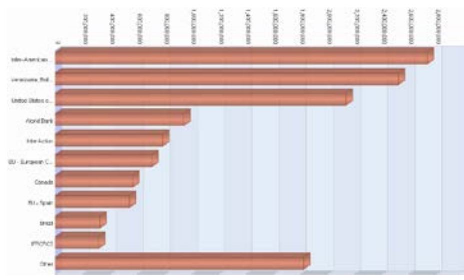
Figure 24: Main Screen of the Chart Module

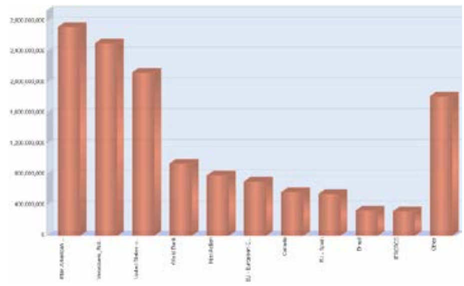
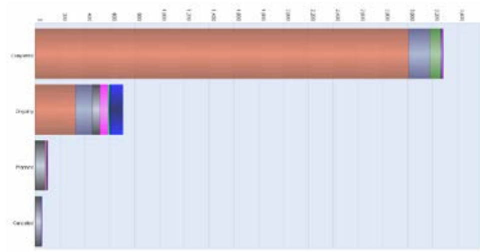
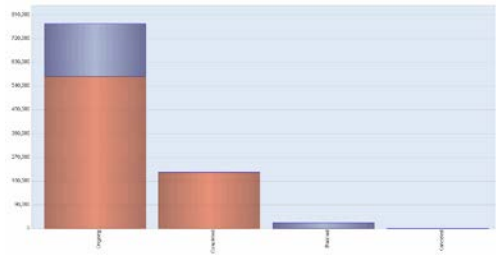
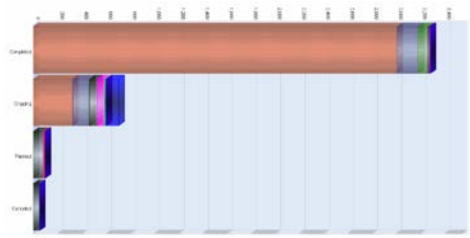
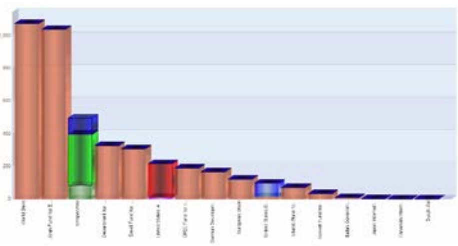
1. **Category** - allows selecting one of the options provided in the **Category** drop-down menu located at the top of the *Chart* window. The selected category will define one of the chart axes. Selection of a category for the chart report is required.

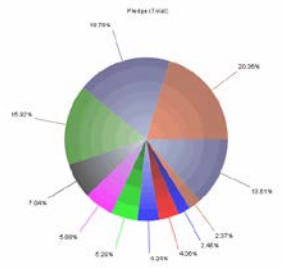
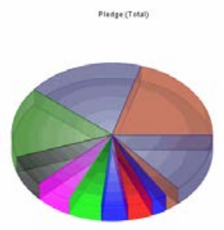
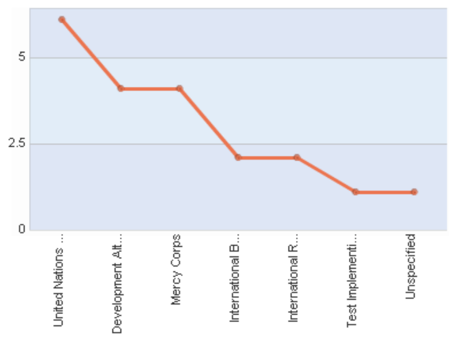
2. **Series** - allows selecting one of the options provided in the **Series** drop-down menu located at the top of the *Chart* window. The selected series will define the chart legend. Selection of a series for the chart report is optional.

   Note: Clicking the **(Swap)** button allows switching places of category and series selections.

3. **Chart Types** - allows defining the chart type. The following options are available:

Chart Type	Example
1. Bar	
2. Column	
3. 3D Bar	

4. 3D Column	
5. Stacked Bar	
6. Stacked Column	
7. Stacked 3D Bar	
8. Stacked 3D Column	

9. Pie	
10. 3D Pie	
11. Line	

4. **Show Top <Number>** - indicates the maximal number of category items to be displayed in the chart.

5. **Show Top <Number> on Secondary Axis** - indicates the maximal number of series items that should be displayed on the secondary axis in the chart. Becomes available only if a Series is selected. This option is disabled if you have selected the pie or line chart types.

6. **Char Count** - limits the number of characters to be used to display the category item names to the value set in this field.

7. **Values** - allows selecting a value from the list that will define the main chart criteria.

8. **Update** - loads the latest data from the database and displays them on the chart.

9. **Reset default** - loads the default chart built according to the default chart category and chart type.

10. **Workspace** - the main working area in the *Chart* module where the chart designed is displayed.

9.4 View Screen and Its Components

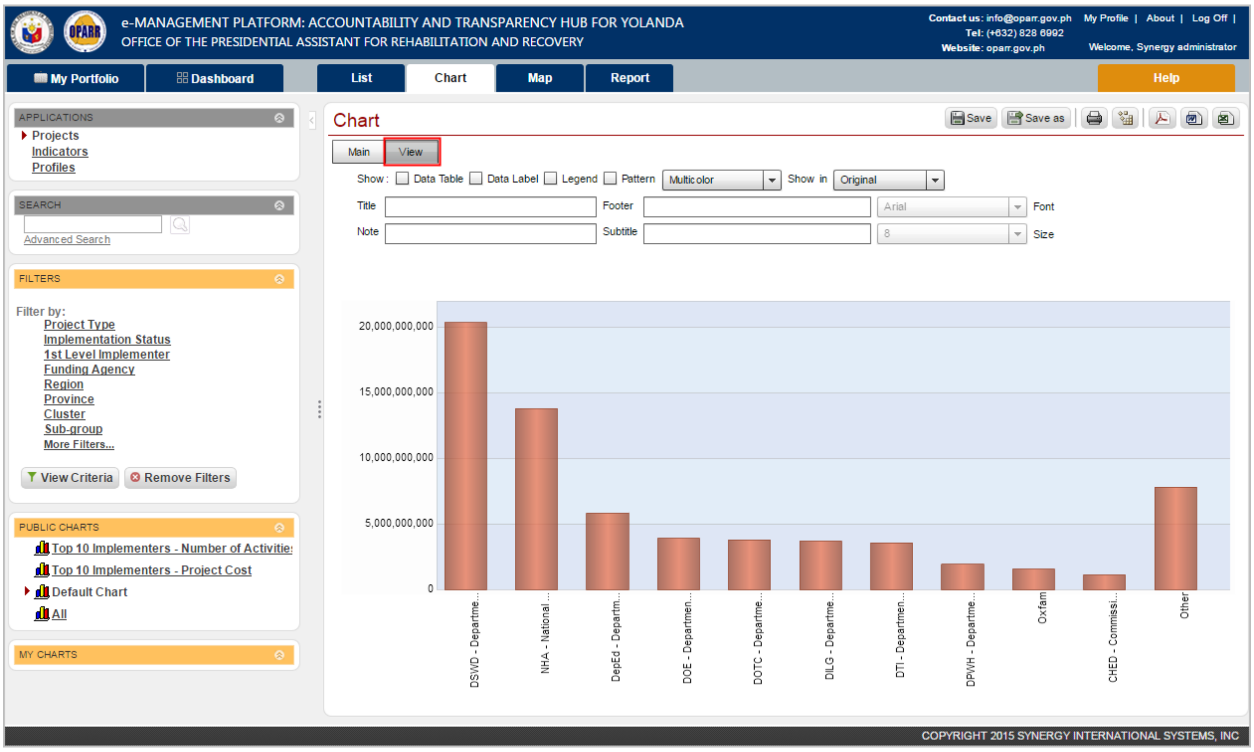


Figure 25: View Screen of the Chart Module

1. **Show -** allows selecting one or several of the following options:
   - ***Data Table -*** presents the information contained in the chart in a grid or matrix.
   - ***Data Label -*** shows the actual values of each chart cell. This option is disabled if you have selected the pie or line chart types.
   - ***Legend -*** explains the categories and data series displayed on the chart.
   - ***Pattern -*** allows choosing a pattern-filled chart for black and white printing.
   - ***Coloring Option -*** allows defining whether the chart should be displayed in multiple colors or in one of the colors available.
   - ***Show In -*** allows defining how the numeric values will be displayed on the chart. To avoid large number occupying too much space, you can choose to view the numbers in thousands / millions / billions.

2. **Title** – a text box to enter the chart report title.

3. **Note -** a text box to enter additional information about the chart report.

4. **Footer -** a text box to insert a portion of text that will appear in the bottom area of the chart report.

5. **Subtitle -** a text box to enter a subtitle for the chart report.

6. **Font -** allows selecting the font the chart report title/subtitle/footer/note will appear in.
7. **Size -** allows selecting the font size the chart report title/subtitle/footer/note will appear in.

8. **Workspace -** the main working area in the *Chart* module where the chart designed is displayed.

9.5 Sample Chart Reports

In the following chapters, you can see several samples on chart reports.

9.5.1 Sample Chart Report 1

If you have selected **Project Type** as a chart category, **Project Cost (USD)** as a value to be shown on the chart, **Region** as a chart series, clicked the **3D Column** chart button to specify the chart type, and activated the **Legend** option in the *View* window, the following chart report will appear (Figure 26):

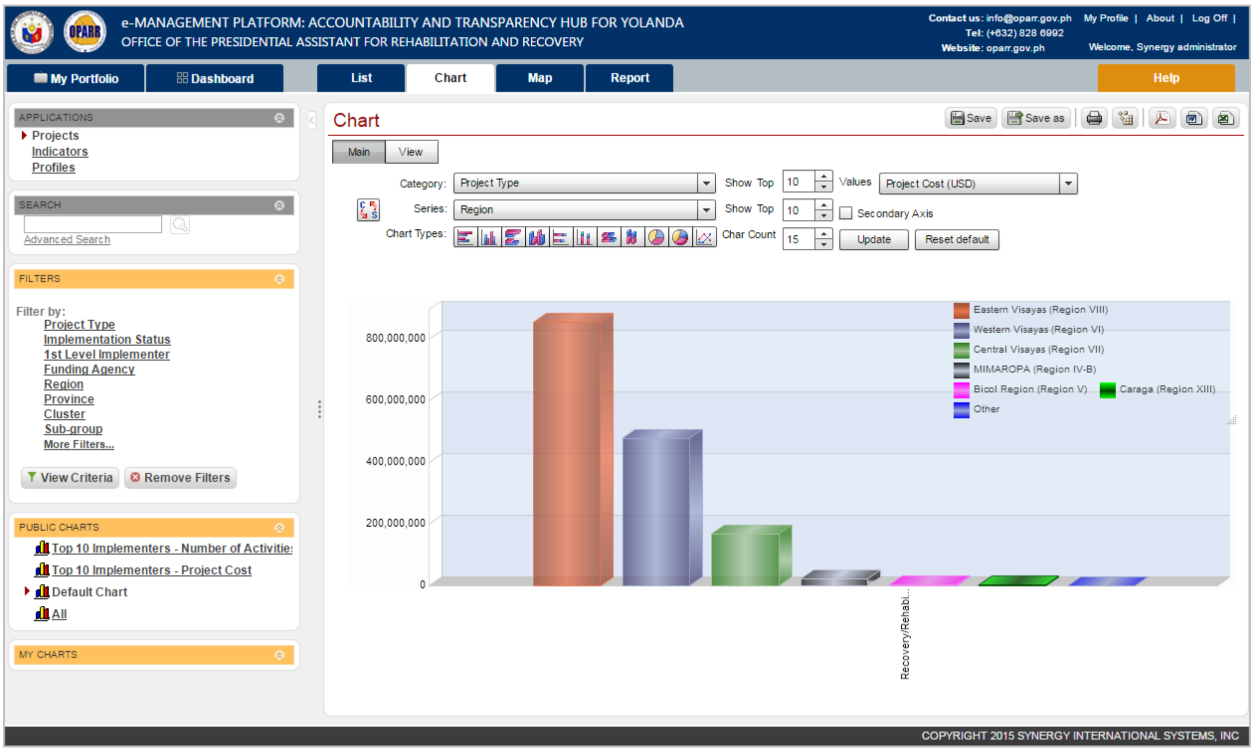


Figure 26: Sample Chart Report 1

9.5.2 Sample Chart Report 2

If you have selected **Cluster** as a chart category, **Project Cost (PHP)** as a value to be shown on the chart, clicked the **3D Pie** chart button to specify the chart type, and activated the **Legend** option in the *View* window, the following chart report will appear (Figure 27):

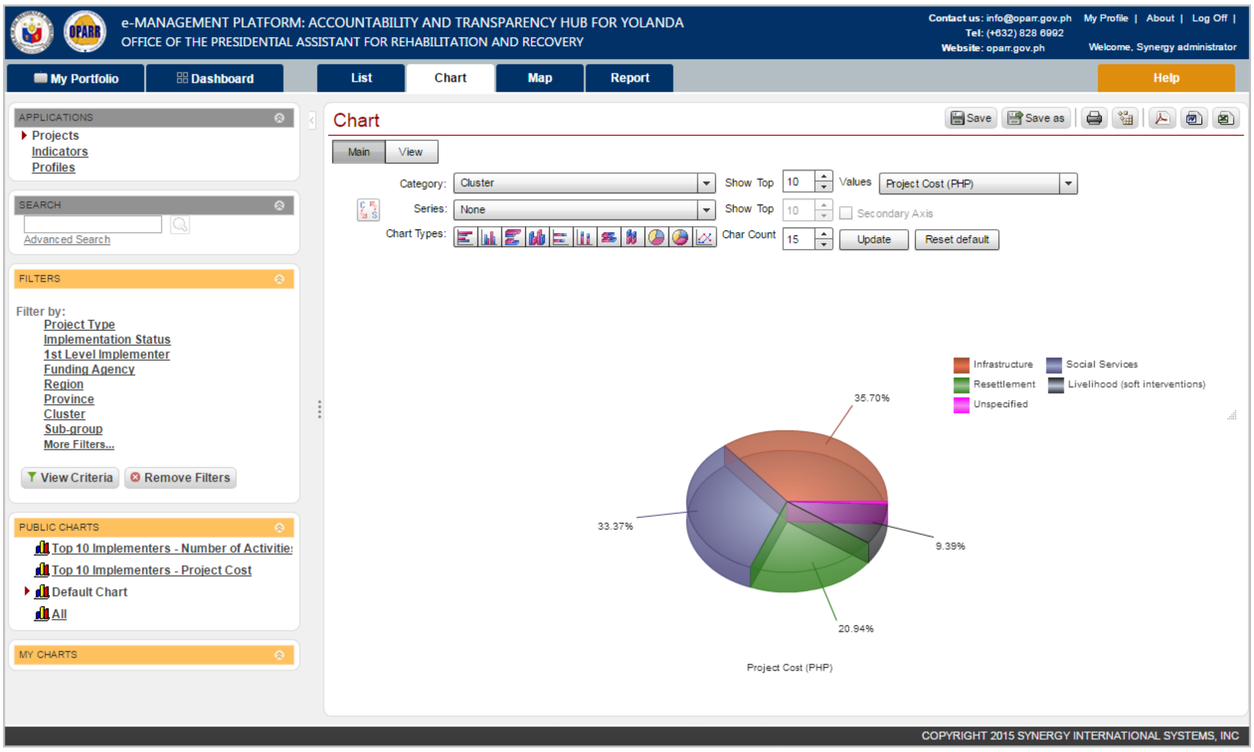


Figure 27: Sample Chart Report 2

10. MAP MODULE

In the *Map* module of the *eMPATHY* application, you can make use of an advanced GIS tool for data visualization. The GIS tool brings together maps, data and different data layers for informed decision making, data analysis and reporting. It is a practical tool to visualize data from the geospatial perspective as it enables precise, real-time mapping and visualization of all data associated with various data sets in the system. The resulting data visualizations will allow to quickly and easily draw out key findings from the data on the map.

Moreover, the GIS tool offers an impressive array of state-of-the-art features that allow plotting different data series on the map of the Philippines and generate map reports for data analysis. They also give you the opportunity to query, aggregate, disaggregate, filter, and edit data on a map, visually capture data at any desired level, from the most general to the most detailed one. Moreover, you have the ability to zoom freely; to select a point on a map and ask the system to display any category of data within a given radius (‘buffered zone querying’); to measure distance between any two points on the map, etc.

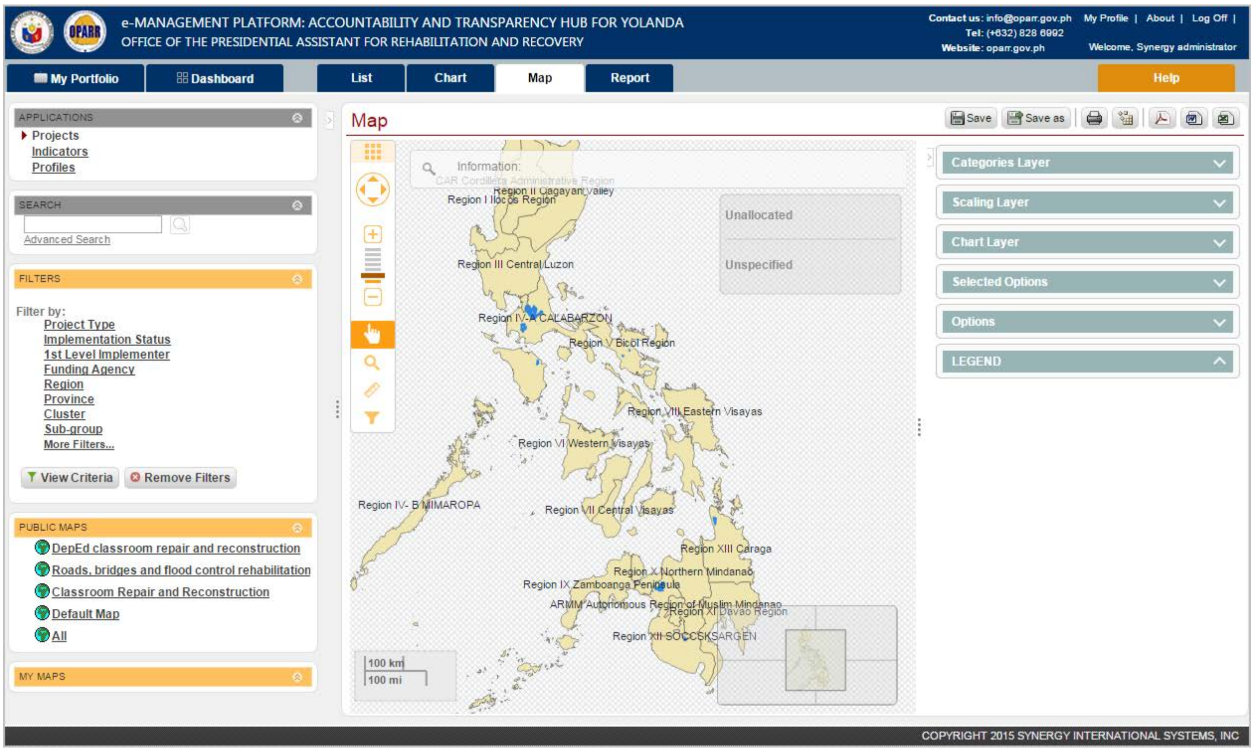


Figure 28: Map Module

10.1 Key Features of the GIS Tools

You can make use of the following key features of the *Map* module in *eMPATHY*:

- ✓ The ability to visualize data analysis results on a map;
- ✓ A rich set of data visualization options;
- ✓ The ability to create map reports and integrate them into larger reports;
- ✓ The ability to print reports for future reference or export them in the desired format;
- ✓ The possibility of plotting categories and graphs on the map;
- ✓ Display of dynamic legends depending on the selection of layers;

- ✓ The ability to measure distance between any two points on the map and to create buffered zones;
- ✓ Coloring of administrative territories based on dynamic scaling.

10.2 Accessing the Map Module

The system provides for the opportunity to present data on the map of the country. In order to access the *Map* module of the system, click the **Map** tab. You will be navigated to the *Map* module where the map of the country is displayed.

In the *Map* module, you can choose to view different data sets displayed on the map, create and display reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

10.3 Map Module Screen Components

The following figure describes some of the features available in the main screen of the *Map* module (Figure 28):

1. **Zoom to panel -** allows free zooming to the desired administrative unit.

2. **Navigation controls -** a set of tools that provide common navigation functions, such as panning and zooming, measuring distance and creating buffered zones. Please note that the navigation controls pane is constantly present on the screen for easy access to the map navigation options. However, it can be toggled to allow a better view of the map.

3. **Map -** the map of the country.

4. **Scale Bar -** allows you to work out the distances on the map. The distances are expressed both in the metric and English units of measure.

5. **Mini Map -** an overview map of the entire country displayed in a small window allowing quick navigation to a desired location with one click without having to zoom out, find the new location and zoom in again.

6. **Categories Layer** – provides a variety of categories to choose to display on the map.

7. **Scaling Layer -** provides a variety of data series to choose from to display on a scaling map.

8. **Chart Layer** – provides a variety of data series to choose from to plot on a map in the form of bar or pie charts.

9. **Selected Options** – displays an array of options (categories, scaling, chart, and border) that have been selected for the map report.

10. **Options Panel** – allows defining additional characteristics for the map report. These characteristics can include the type of the chart to be plotted, border options, whether lakes and other water reservoirs should be displayed, etc. In this panel, you can also define custom coloring patterns for a scaling map.

11. **Legend Panel -** explains the categories and data series displayed on the map.

12. **Location information section -** displays the name of the administrative unit when it is pointed on the map.

13. **Cursor position section -** displays the geographic coordinates (expressed as latitude and longitude) for any point on the map.

10.4 Working in the Map Module

10.4.1 Zooming in / Zooming out

The GIS tool is equipped with the advanced zooming capabilities used to enlarge or reduce the view of the map on the screen. The following zooming options are available:

Free zoom in / zoom out

This option allows you to easily explore the data through Intelligent Searching. To be able to do it, you should click the **(Search)** icon in the *Location Information* section and enter any combination of letters to search for. The results will return all administrative territories that match the search criteria. You can select the administrative territory to navigate to from the list containing the search results (Figure 29). The selected item will be magnified and displayed in the main screen.

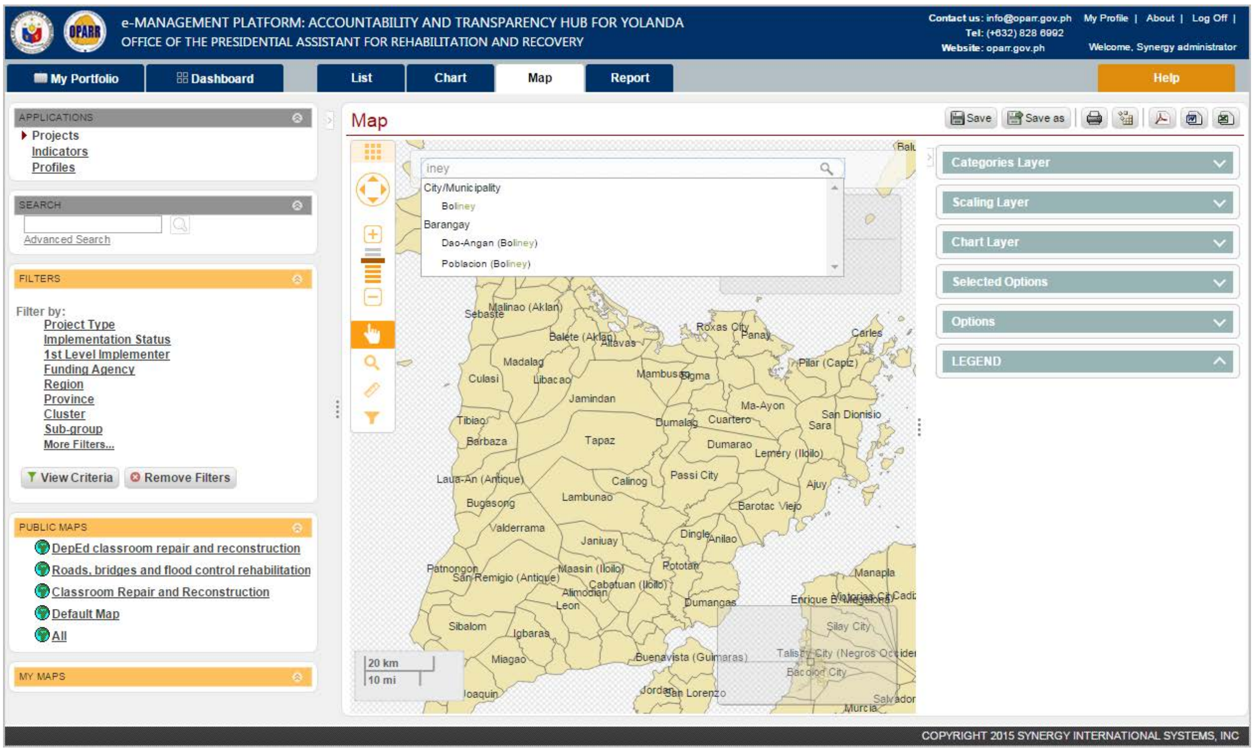


Figure 29: Intelligent Searching

Scaled zoom in / zoom out

This option allows zooming in / zooming out using the scale tool available in the Advanced GIS.

This means that when changing the zoom scales by clicking either on ⊞ or ⊟, you can magnify or reduce the viewport according to the scale value.

Mouse wheel-based zoom-in/zoom-out

This option supports mouse wheel-based zooming in / zooming out. In order to enlarge or reduce the viewport using the scroll wheel button of the mouse, you should click anywhere on the map and use the wheel button in the backward motion to zoom in and in the forward motion to zoom out.

Zoom by Selection

This option allows magnifying the original viewport or a portion of it using the mouse. To be able to enlarge an area on the map, you should activate the *Zoom by Selection* option by clicking the button then select a region on the map to magnify (Figure 30).

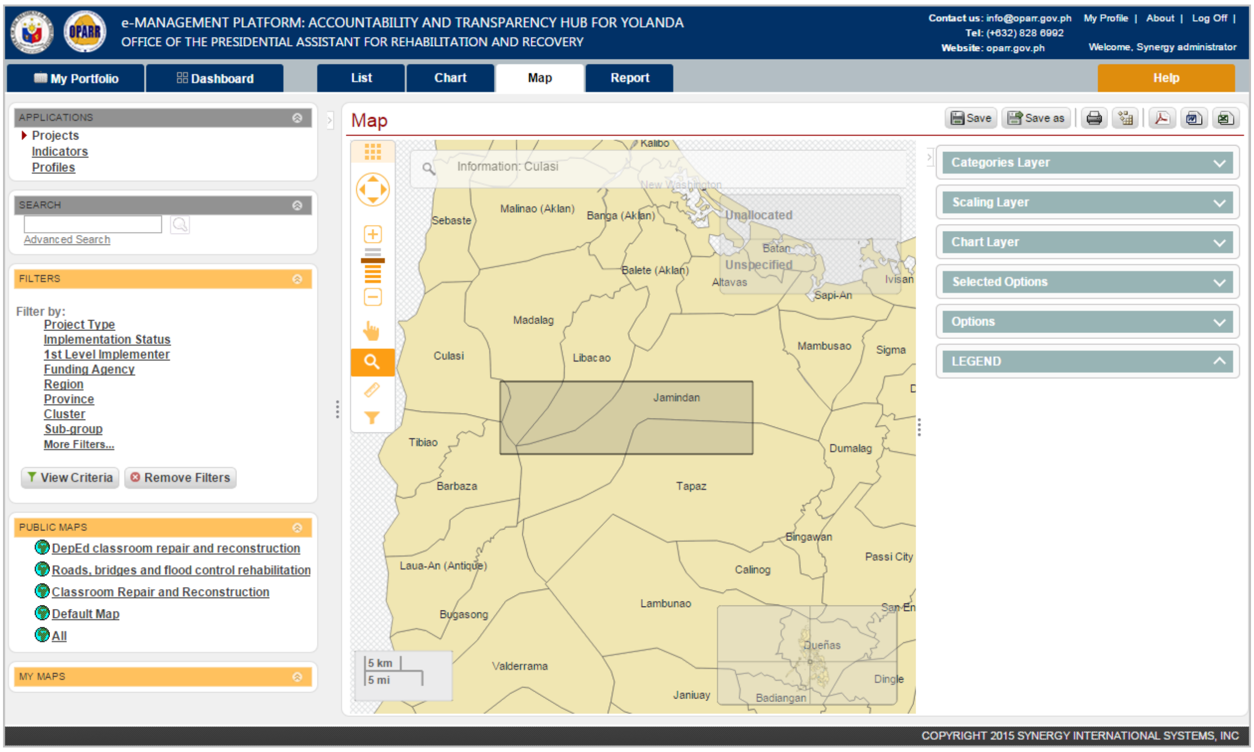


Figure 30: Zooming by Selection

10.4.2 Measuring Distance

In the *Map* module, you can measure the distance between two points on the map.

To do this, click the button, select the point on the map and drag the mouse to the second point to trace a path to measure (Figure 31). The measured distance will be expressed both in metric and English units of measure.

Note: Measuring is calculated using the latitude and longitude coordinates from point to point and does not consider elevation.

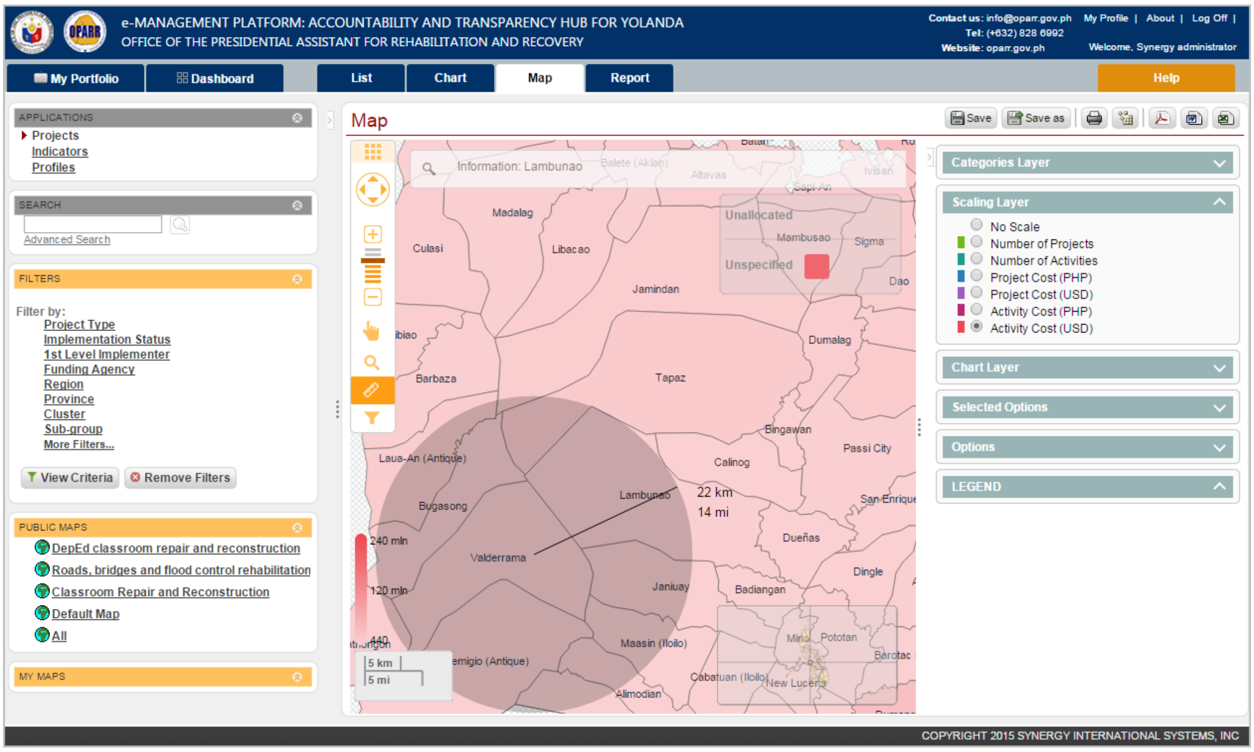


Figure 31: Measuring Distance

10.4.3 Buffered Zone Querying

This feature in the Advanced GIS tool is used to select a point on a map and display any type of data within a given radius. In addition, the tool is easily navigable through a Mini Map, Navigation Bar and Intelligent Search Tools.

To be able to create a buffered zone to view data for, select the button, and then select the region on the map to highlight. The selected area will be activated while the rest of the screen will be disabled (Figure 32). This tool may be useful for presentations on screenshots to mark the selected area on the map.

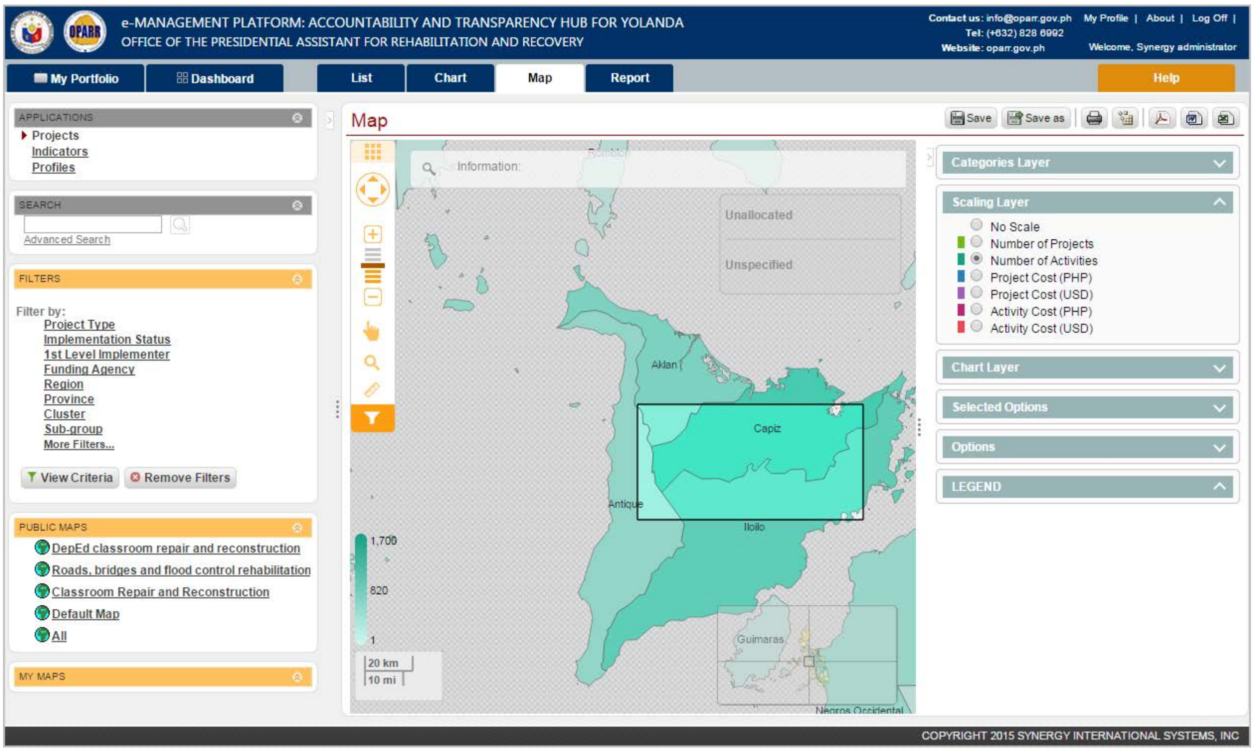


Figure 32: Buffered Zone Querying

10.4.4 Using Layers

The *Layers* feature in the *Map* module provides a variety of data to select to display over the viewing area. Layers are the mechanism used to display different datasets on the map for data visualization. Each layer references a dataset that is stored in the database.

You can use the *Layers* feature to display the following information:

- Display categories
- Choose to view data on a scaling map
- Plot data in the form of different graphs (pie chart or bar chart)

The following layers can be applied in *eMPATHY*:

Categories

This option is used to plot category data on the map and to view them in form of different icons / images. To enable this option, expand the *Categories Layer* and select one of the category(ies) listed. Please note that by default, the *1st Level Implementer* category is selected.

Note: When pointing the mouse cursor on a respective icon/image on the map, you can view the details for the selected category.

Scaling

This option is used to view the data on a scaling map. This means that the data series selected in the *Scaling Layer* will not be displayed in the form of graphs, but the

administrative territories will be colored according to the selected scaling category instead. The scaling legend at the bottom left side of the map prompts on the coloring pattern used. To enable this option, expand the *Scaling Layer* section and select one of the possible alternatives listed. Please note that by default, the *Number of Projects* scaling is selected.

Chart

You can plot different data series on a map and view them in the form of different graphs, such as pie charts or bar charts. You can turn on this option by expanding the *Chart Layer* panel and selecting the chart category(-ies) to be displayed on the map. By default, the selected category(-ies) will appear in the form of a pie chart. However, you can choose the view the data in the form of a bar chart by selecting the appropriate option from the *Chart Type* drop-down (Figure 33).

Note: When pointing the mouse cursor on any of the chart constituents, you can view the data that stands behind it. The details on plotted chart categories are displayed when clicking the ⓘ button.

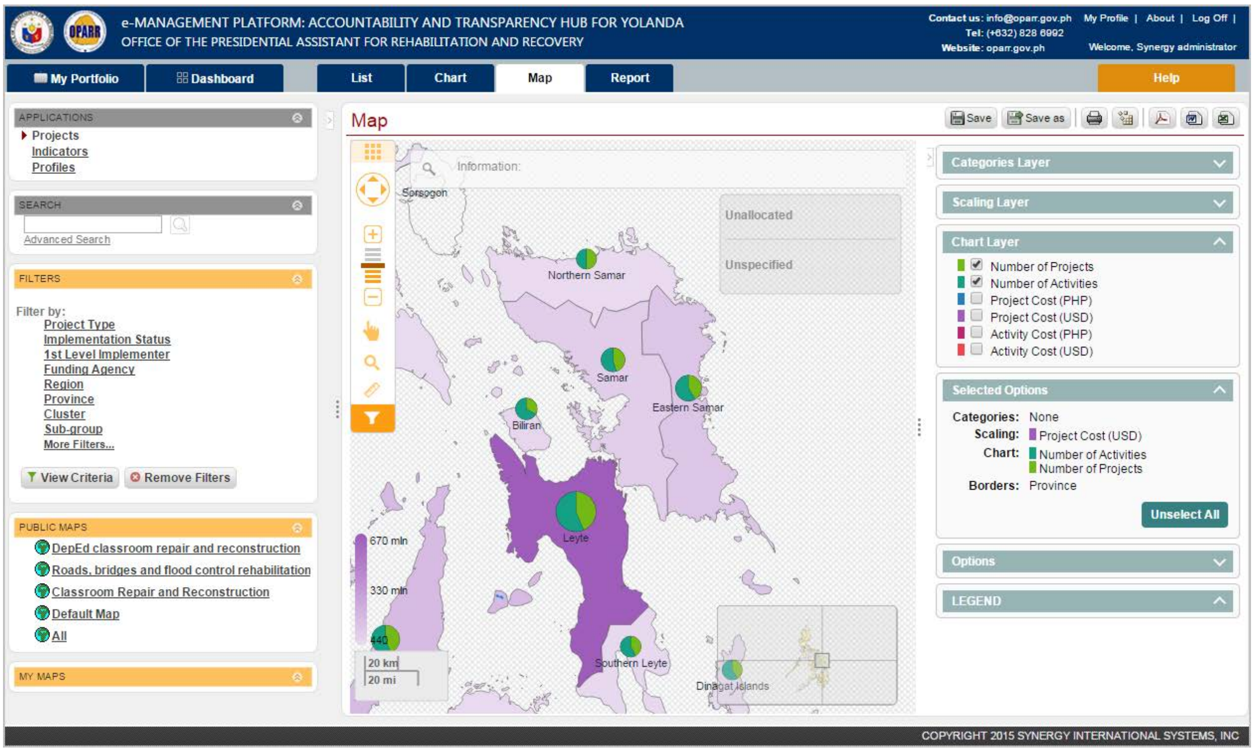


Figure 33: Selecting a Chart Type

10.4.5 Setting Map Options

In the *Map* module, you can define the map options that will override the default values currently set for any map report created. You can use the *Options* section to define the following values:

- Indicate whether the data plotted on the map should display in the form of a bar chart or pie chart;
- Define custom scaling options for the map report;
- Display border information for all territorial units in the country.

Chart Type

As it has been stated in the chapters above, you can plot different data series on the map and display them in the form of a pie or bar chart. By default, the data series selected in the *Chart Layer* section will be available in the form of a pie chart. However, you can set the chart type to a bar chart in the *Options* section.

In order to display your data series in the form of a bar chart, follow the steps below:

1. Expand the **Options** section.
2. Select the **Bar Chart** radio button.

Scaling Mode

In the *Map* module of the *eMPATHY* application, you can plot data on a scaling map for better data visualization and analysis. You may choose between the two options that the platform offers: you may use one of the pre-defined coloring patterns or you may create a customized scaling map where you will have to define the coloring options for each range of values that you want to plot on the map.

To view the data on a scaling map, follow the steps below:

1. Expand the **Scaling Layer** panel.
2. Select one of the possible alternatives.

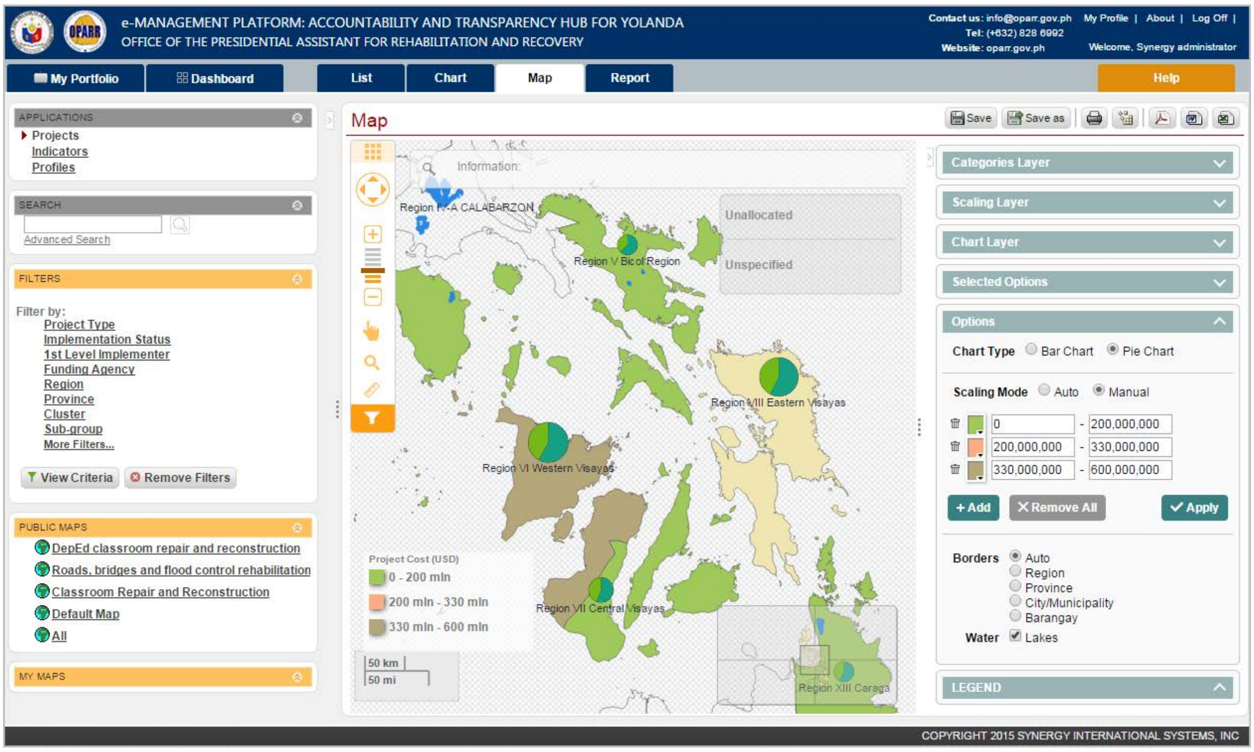


Figure 34: Selecting Scaling Range

In order to view the data on a customized scaling map, follow the steps below:

1. Expand the **Options** panel.
2. Set the **Scaling Mode** to *Manual* by activating the respective radio button (Figure 34).

3. Click the **Add** button.
4. Specify the **Coloring** options for each data range and specify the values that stand behind it**.**
5. Click the **Apply** button for the changes to take effect.

Note: You can remove a custom scaling option by clicking the 🗑 icon. Or, you can remove all the defined scaling options by clicking the **Remove All** button.

Borders

You can turn on border information by expanding the *Options* panel and selecting one of the following options:

- **Auto -** displays border information for all territorial units when the zoom in is selected.
- **Region -** displays the border information for all regions.
- **Province -** displays the border information for all provinces.
- **City/Municipality** - displays the border information for all cities/municipalities.
- **Barangay** - displays the border information for all barangays.

You can also select to display such water reservoirs as lakes on the map by selecting the **Water** checkbox.

10.4.6 Viewing Legend

To explain the data series or categories on the map, the legend is used to identify the patterns or colors that are assigned to the selected categories (Figure 35).

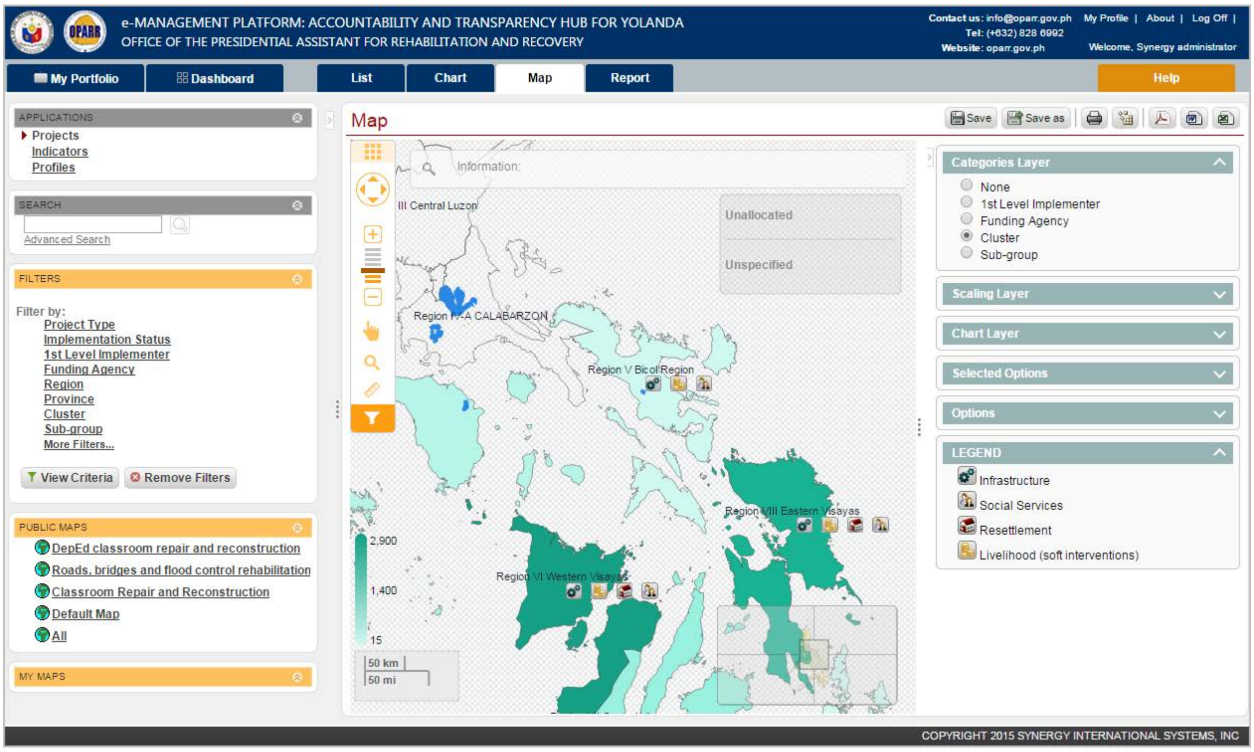


Figure 35: Viewing Chart Legend

It is worth mentioning that each data series or category is represented by a unique pattern or color in the map legend, which is displayed in the following ways:

- In the *Legend* panel if you have chosen to apply any category to the map.
- At the bottom left side of the map if you have selected to view data on the scaling map.

10.4.7 Using Mini Map

The Mini Map window feature displays an additional view of the country map with a position indicator that corresponds to the current view inside the main screen (Figure 36). One of the main features of the Mini Map is that while the Mini Map window responds to position adjustments in the main screen, you can also interact directly with it. Double-clicking any area within the window or dragging the position cursor to the desired place will adjust position both in the Mini Map and in the main screen to the point in the Mini Map window that the user selects.

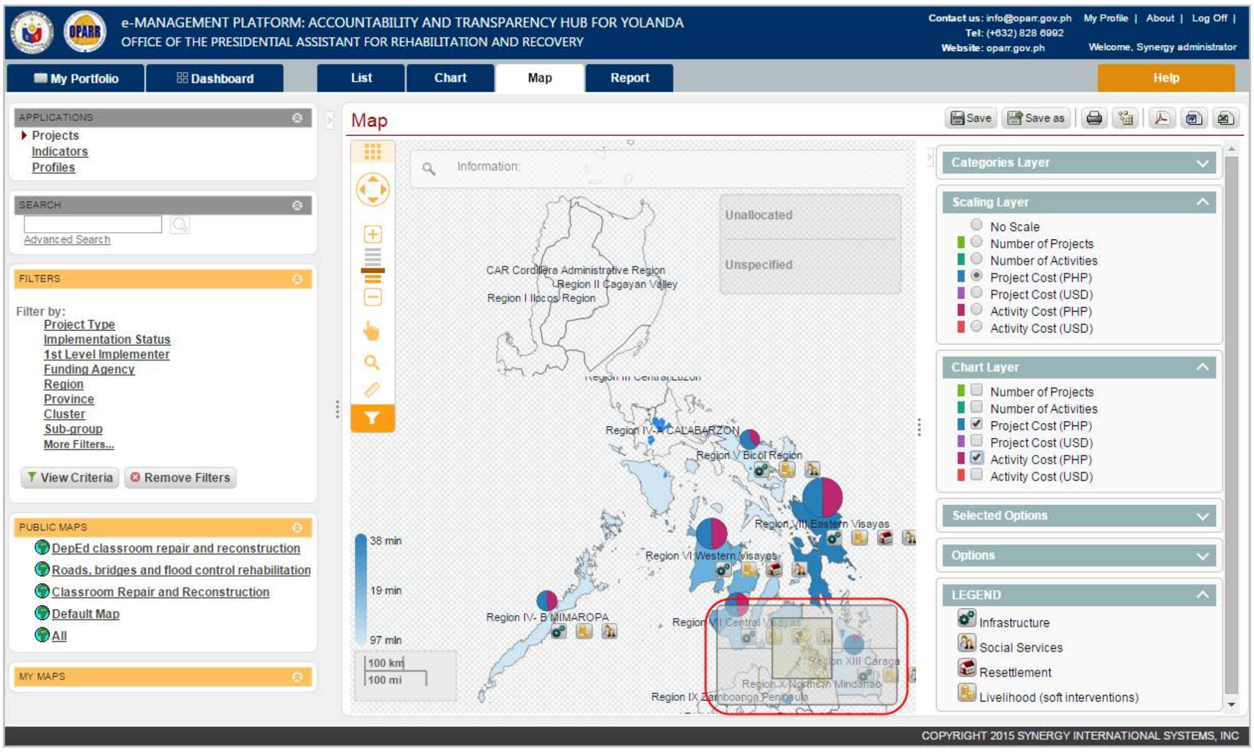


Figure 36: Using Mini Map

10.4.8 Viewing the Data Displayed on the Map

The Advanced GIS tool is used to view the data referring to definite territorial units – region or cities/municipalities when zoomed in to this level. In order to access the data for a specific territorial unit, click the name of the respective territorial unit (Figure 37). The information that is displayed in the information window includes but is not limited to number of projects and activities, project cost, activity cost, etc. If you have plotted any chart category on the map, the chart category details appear in the information window as well.

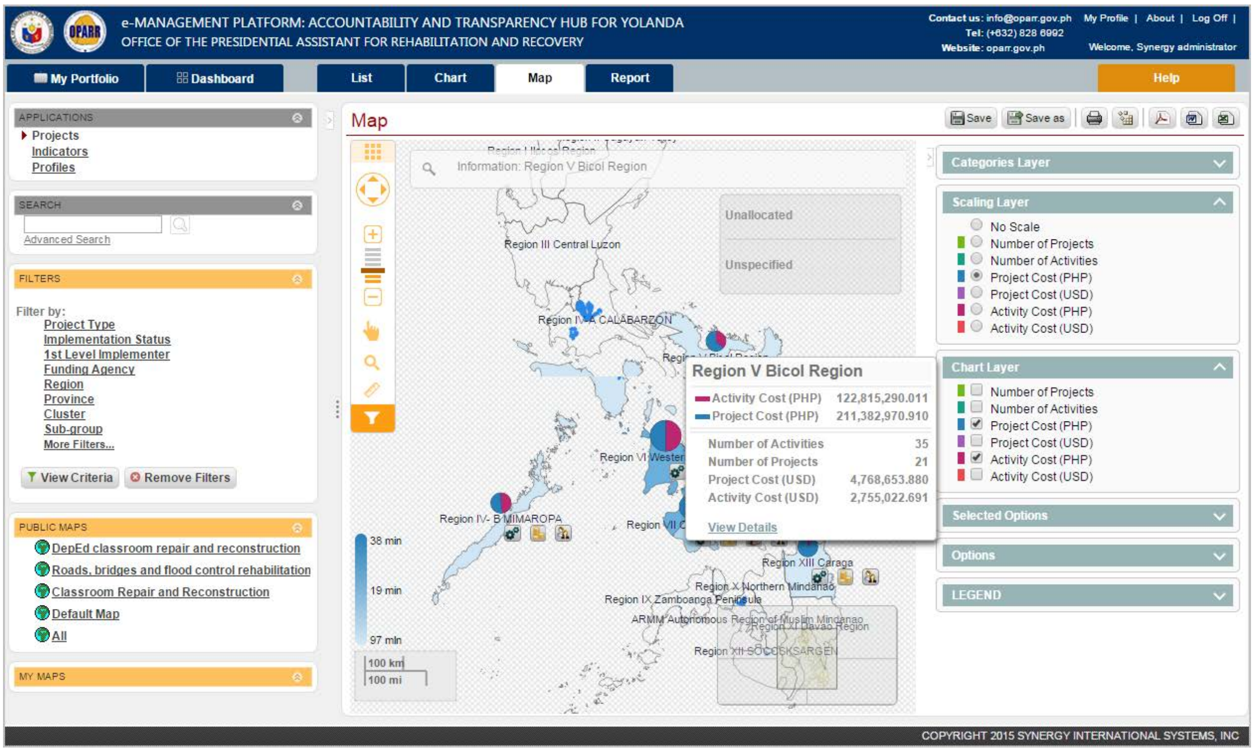


Figure 37: Viewing the Data Displayed on the Map

Also, you can view information on unspecified and unallocated projects that do not have any territorial unit reference. To view data on these projects, click the respective *Unspecified* or *Unallocated* section.

Note: Clicking the **View Details** link at the bottom of the information window will take you to the *Details* section of the application. For more information about the actions that can be taken in this section, see DETAILS SECTION.

10.5 Sample Map Reports

In the following chapters, you can see several samples on map reports.

10.5.1 Sample Map Report 1

You will get the following map report if you have selected **Number of Activities** as scaling and **Project Cost (USD)** and **Activity Cost (USD)** as map chart constituents (Figure 38):

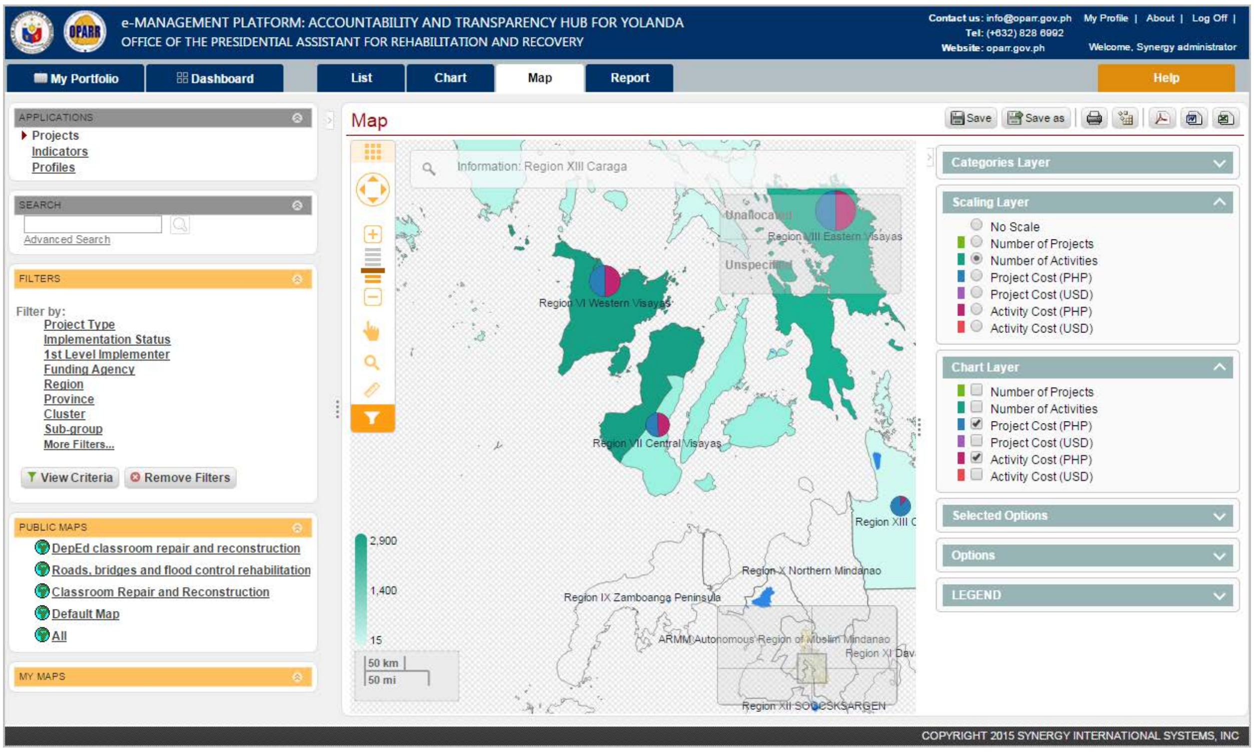


Figure 38: Sample Map Report 1

10.5.2 Sample Map Report 2

If you have selected **Cluster** as a map category, **Activity Cost (USD)** as scaling, and opened the **Legend** panel, the following map report will appear (Figure 39):

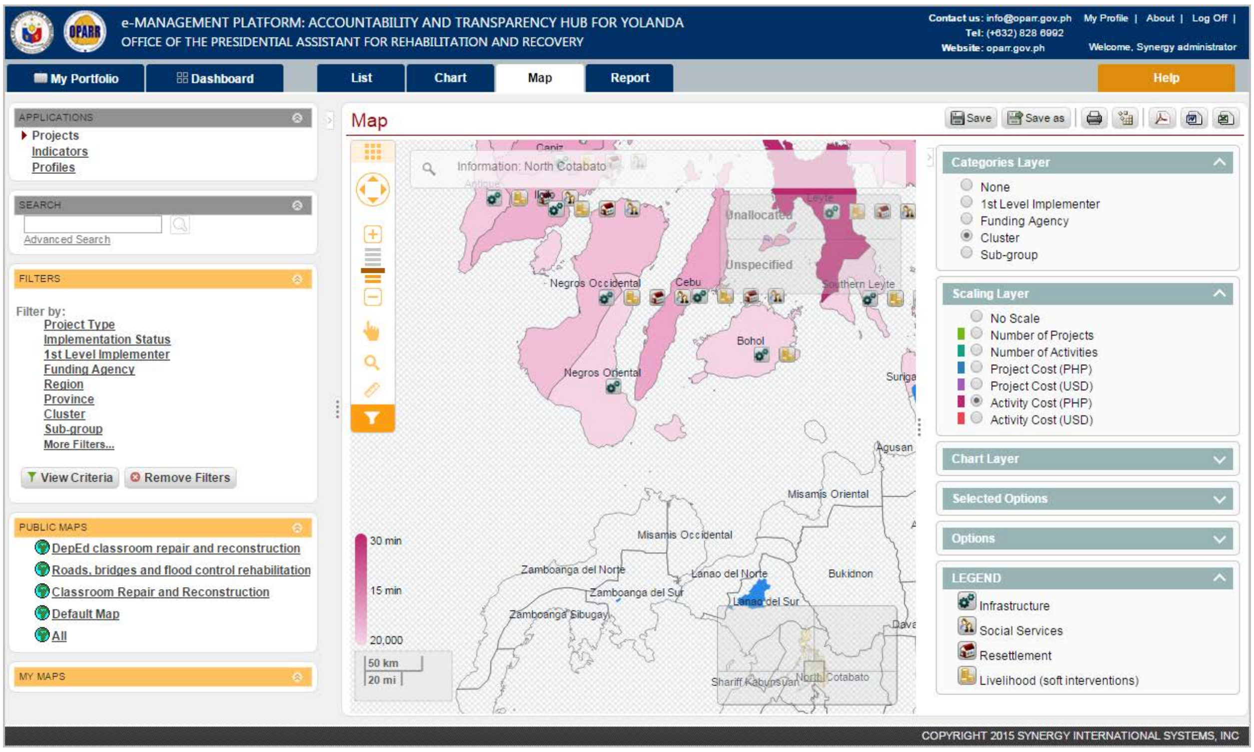


Figure 39: Sample Map Report 2

11. REPORT MODULE

In the *Report* module of *eMPATHY*, you can create and execute ad-hoc queries on the data and acquire the results in the form of different reports.

11.1 Accessing the Report Module

As it has been stated above, the system provides for the opportunity to create different sorts of list reports. In order to access the *Report* module of the system, click the **Report** tab. You will be navigated to the *Report* module of the application where the *Report Designer* (Figure 40) will open.

In this module, you can create list reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

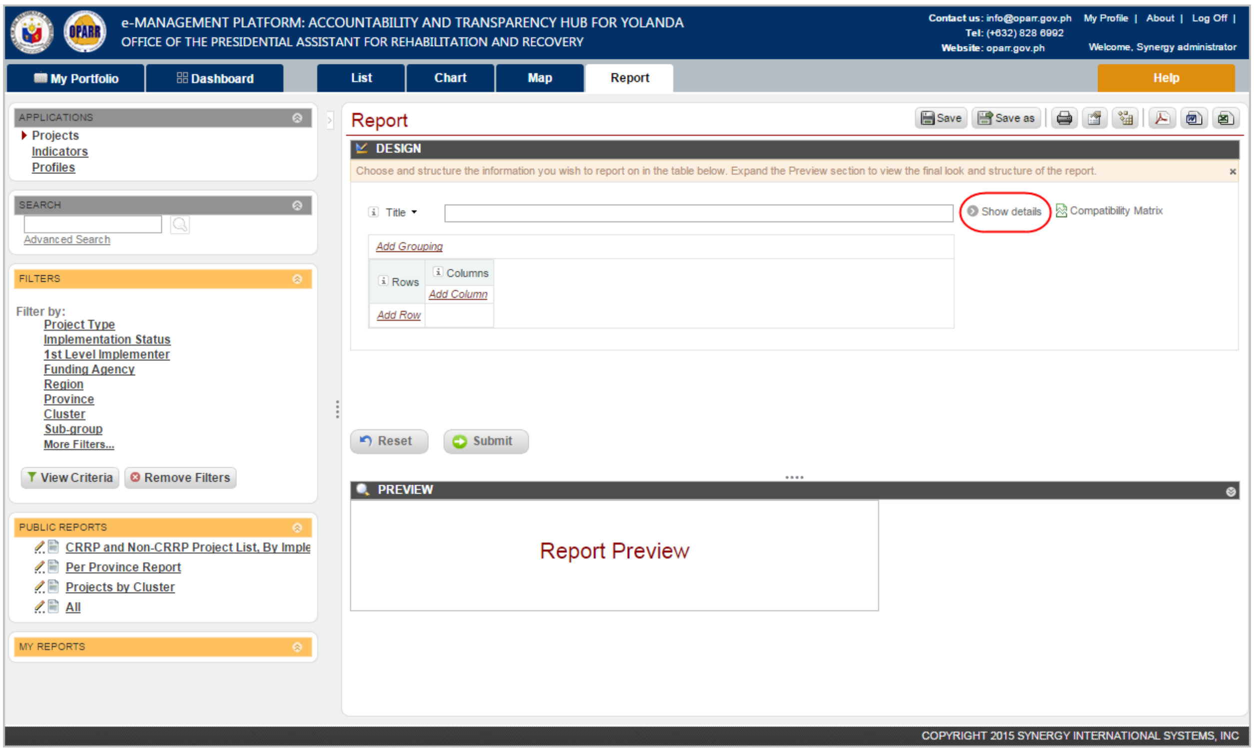


Figure 40: Report Module

11.2 Creating a Report

In order to create a report, i.e. to structure the report table and choose what information should appear in the rows and columns of the table, add report components, which are:

- **Text entries** – title, subtitle, header, and footer. For these fields, the expected input is a free text.
  Note: By default, the *Report Designer* gives you the possibility of adding report titles. However, you can change the default view to make adjustments for other text entry components (sub-title, header and footer) as well. To be able to provide additional textual information to the report, you will have to click the **Show Details** link (Figure 40) and provide the appropriate information the fields that emerge.

Clicking the **Hide Details** link will collapse the text entry fields displaying only the **Title**.

- **Report grouping** - allows grouping data according to a specific category. Grouped data appear in different tables. Each table contains data that fall under one group of the category specified.
- **Rows** - group data within the report table.
- **Columns** - show details specific to each table row.
- **Sub-columns** - divide the row details displayed under each column.

In order to add report components, follow the steps below:

1. Type the text that should appear as the report title in the **Title** text box.
2. Enter a **Subtitle**, **Header**, and **Footer** if needed.
3. In the *Group Report by* section, specify the category, which will be used to group data into different tables. To add a report grouping, click the **Add Grouping** link in the *Group Report by* section and select the appropriate category from the menu that appears (Figure 41).
   Note: The report will be divided into as many tables as there are table groupings selected.

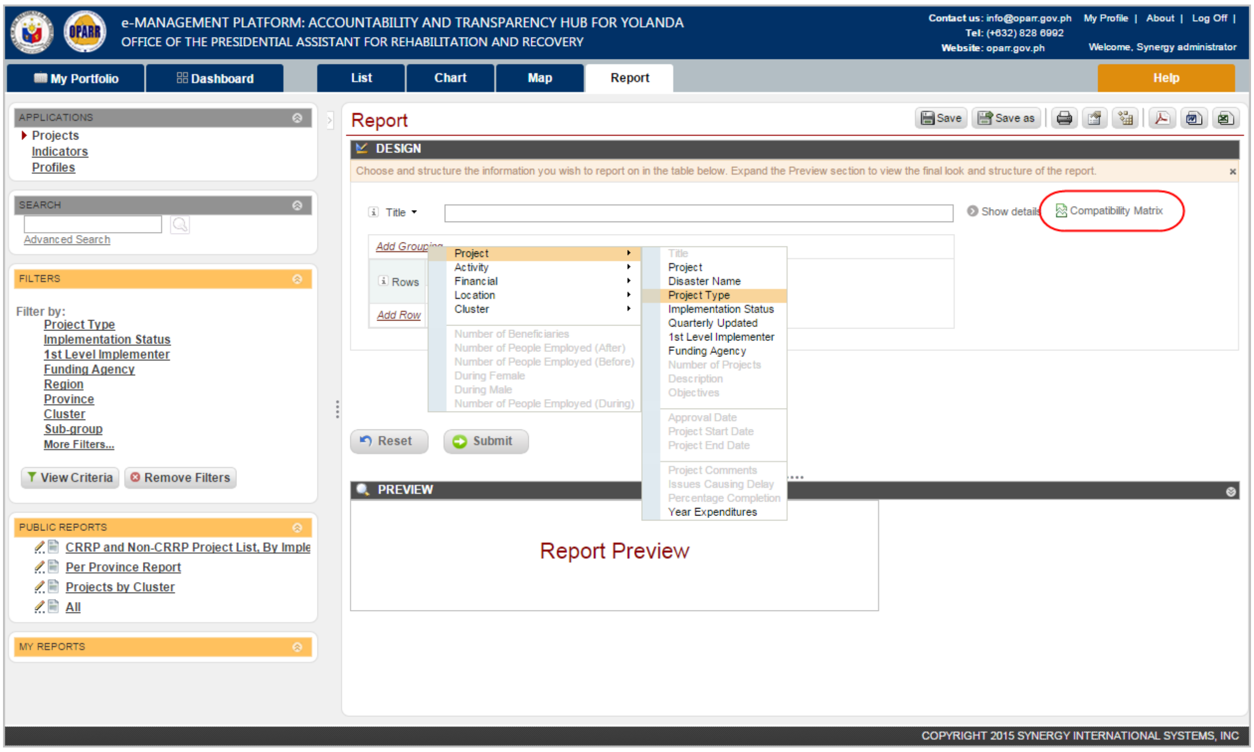


Figure 41: Selecting a Grouping for a Report

4. Select table rows by clicking the **Add Row** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one row at a time from the list of available rows.
5. Select table columns by clicking the **Add Column** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one column at a time from the list of available columns.

Note: Once you have selected a report column, an **Add Sub-column** link becomes available under the selected column. It allows indicating how the row details displayed under each column will be divided.

Note: At any point it is possible to remove all components selected for the report and design a new report from scratch by clicking the Reset **(Reset)** button.

Note: If you have defined a report which has incompatible columns (columns over which reports cannot be generated), they will be marked in red and an error message will occur. To make your reports productive, use the link (as marked in red, Figure 41) to open the *Compatibility Matrix* table (Figure 42). This is a table that displays the compatibility between all categories and measures in the database to display them in the report.

Compatibility Matrix

• - indicates compatibility between Category and Measure

Rows(Categories) / Columns(Measures)	Activity Cost (PHP)	Activity Cost (USD)	Activity EndDate	Activity Start Date	Approval Date	Baseline	Commitments (PHP)	Commitments (USD)	Description	Disbursements (PHP)	Disbursements (USD)	During Female	During Male	Employed Female After	Employed Female Before	Employed Male After	Employed Male Before
1st Level Implementer	•	•					•	•		•	•						
Activity	•	•	•	•		•											
Barangay	•	•				•											
Cluster	•	•				•											
Complies With Standard Cost	•	•					•	•		•	•						
Disaggregation						•											
Disaster Name	•	•					•	•		•	•						
Funding Agency	•	•					•	•		•	•						
Implementation Status	•	•					•	•		•	•						
Indicator	•	•				•											
Municipality/City	•	•				•											
Project	•	•			•		•	•	•	•	•	•	•	•	•	•	•
Project Type	•	•					•	•		•	•						
Province	•	•				•											
Quarterly Updated																	
Region	•	•				•											
Sub-group	•	•				•											

Figure 42: Compatibility Matrix

11.3 Previewing a Report

At any time during the process of creating a report, look in the *Preview* section at the bottom of the page, in order to view the final structure of the report (Figure 43). The *Preview* will not be ready for viewing unless the user has at least one table row defined.

All your added report components and structuring results will be displayed in the *Preview* section which helps you to check whether the report matches the required output or not. This section can be expanded in order to display whole of the information.

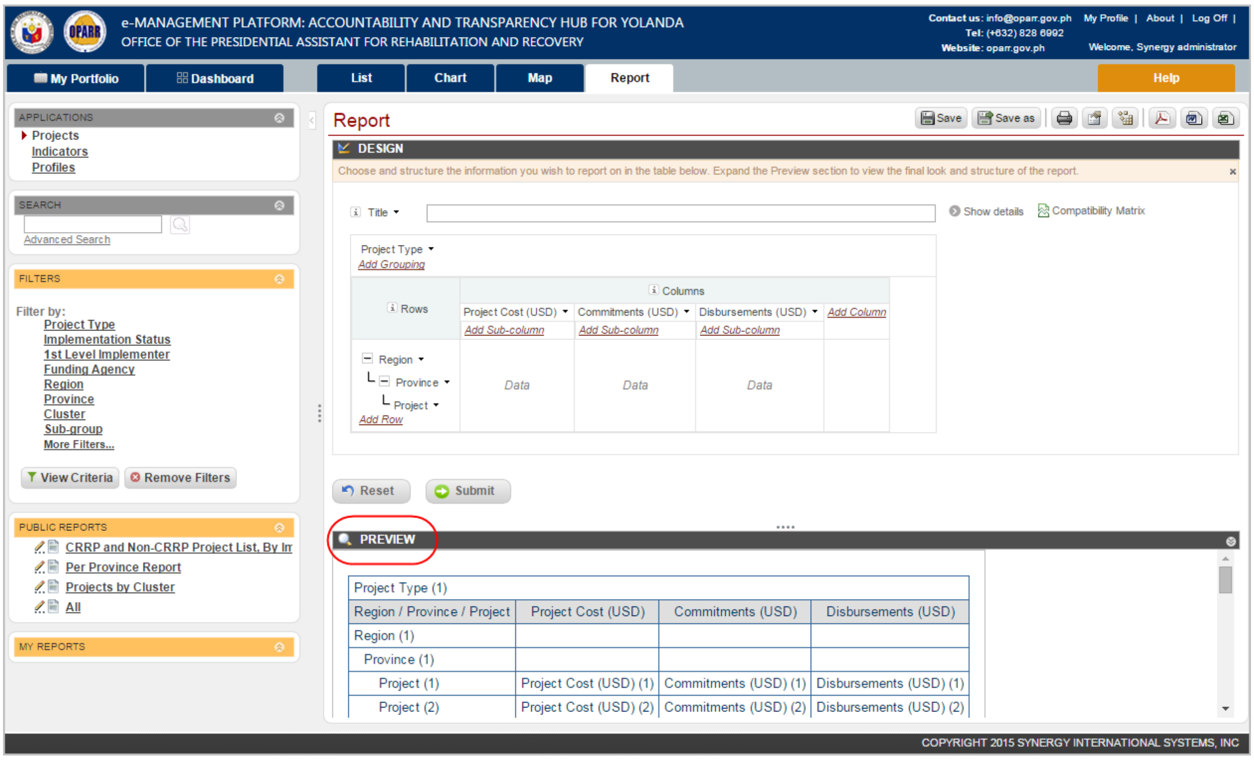


Figure 43: Previewing the Report

11.4 Generating a Report

The final step in the process of creating a report is report generation. By clicking the 

(Submit) button, a request to the *Reporting Engine* is submitted in order to access the database, gather the required data and present it in the manner required. The report containing all the real data appears in a new window.

11.5 Sample Reports

In the following chapters, you can see several samples on tabular reports.

11.5.1 Sample Report 1

If you have indicated (Figure 44):

- **Statistics on Projects in Different Regions and Provinces** as report title;
- **Funding Agency** as report grouping;
- **Project** / **Implementation Status** hierarchy as the report row;
- **Region** and **Province** as columns;
- Applied some formatting (e.g. background color, font size, etc.);

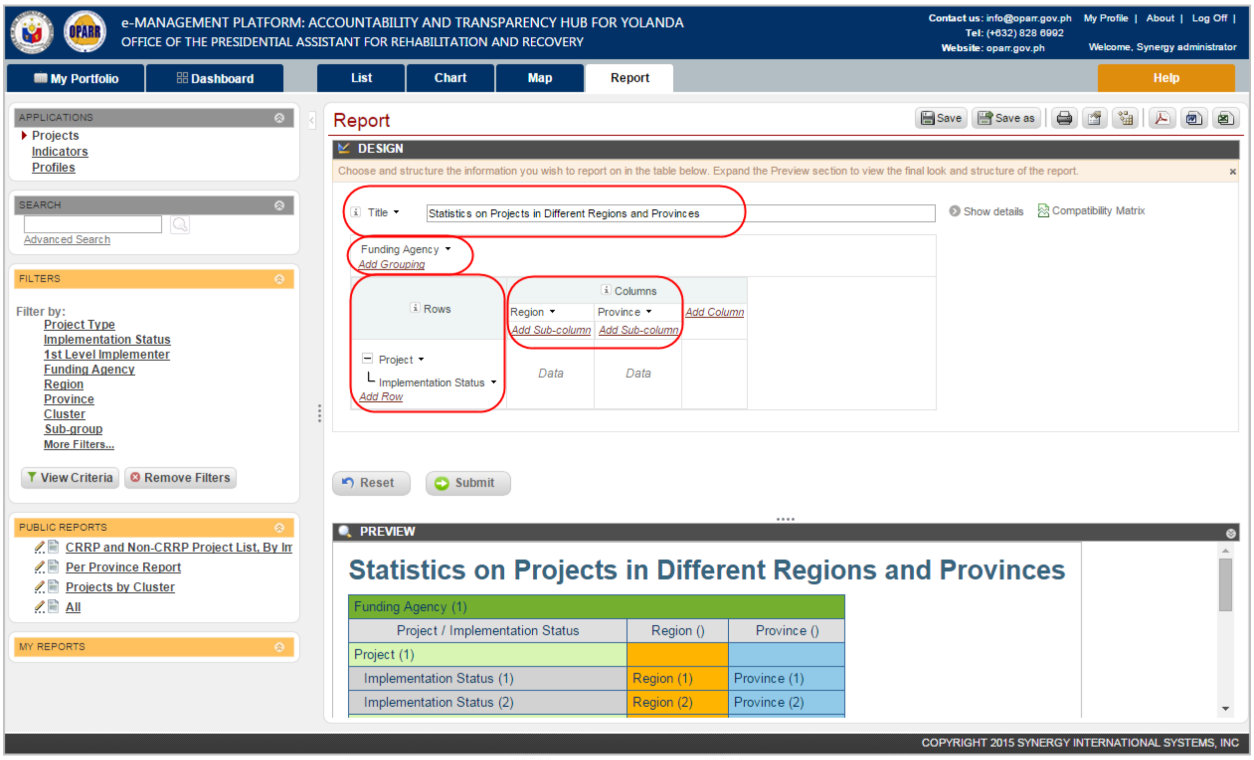
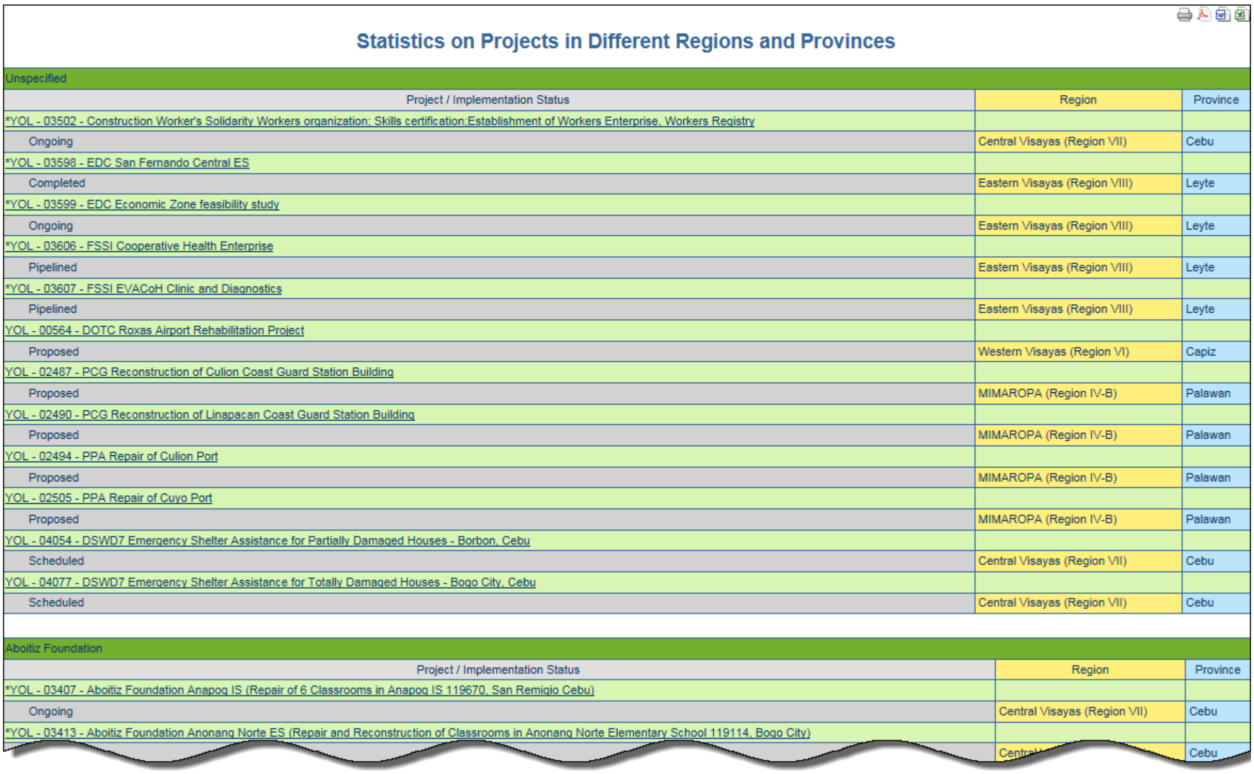


Figure 44: Creating Report 1

You will have the following result (Figure 45):



Statistics on Projects in Different Regions and Provinces

Unspecified

Project / Implementation Status	Region	Province
*YOL - 03502 - Construction Worker's Solidarity Workers organization; Skills certification;Establishment of Workers Enterprise, Workers Registry		
Ongoing	Central Visayas (Region VII)	Cebu
*YOL - 03598 - EDC San Fernando Central ES		
Completed	Eastern Visayas (Region VIII)	Leyte
*YOL - 03599 - EDC Economic Zone feasibility study		
Ongoing	Eastern Visayas (Region VIII)	Leyte
*YOL - 03606 - FSSI Cooperative Health Enterprise		
Pipelined	Eastern Visayas (Region VIII)	Leyte
*YOL - 03607 - FSSI EVACoH Clinic and Diagnostics		
Pipelined	Eastern Visayas (Region VIII)	Leyte
YOL - 00564 - DOTC Roxas Airport Rehabilitation Project		
Proposed	Western Visayas (Region VI)	Capiz
YOL - 02487 - PCG Reconstruction of Culion Coast Guard Station Building		
Proposed	MIMAROPA (Region IV-B)	Palawan
YOL - 02490 - PCG Reconstruction of Linapacan Coast Guard Station Building		
Proposed	MIMAROPA (Region IV-B)	Palawan
YOL - 02494 - PPA Repair of Culion Port		
Proposed	MIMAROPA (Region IV-B)	Palawan
YOL - 02505 - PPA Repair of Cuyo Port		
Proposed	MIMAROPA (Region IV-B)	Palawan
YOL - 04054 - DSWD7 Emergency Shelter Assistance for Partially Damaged Houses - Borbon, Cebu		
Scheduled	Central Visayas (Region VII)	Cebu
YOL - 04077 - DSWD7 Emergency Shelter Assistance for Totally Damaged Houses - Bogo City, Cebu		
Scheduled	Central Visayas (Region VII)	Cebu

Aboitiz Foundation

Project / Implementation Status	Region	Province
*YOL - 03407 - Aboitiz Foundation Anapog IS (Repair of 6 Classrooms in Anapog IS 119670, San Remigio Cebu)		
Ongoing	Central Visayas (Region VII)	Cebu
*YOL - 03413 - Aboitiz Foundation Anonang Norte ES (Repair and Reconstruction of Classrooms in Anonang Norte Elementary School 119114, Bogo City)		
	Centra	Cebu

Figure 45: Sample List Report 1

11.5.2 Sample Report 2

If you have indicated (Figure 46):

- **Statistics on Clusters and Activities** as report title;
- **Cluster** as report grouping;
- **Activity / Indicator / Sub-group** hierarchy as the report row;
- **Activity Cost (USD)** and **Activity Cost (PHP)** as columns;
- Applied some formatting (e.g. background color, font size, etc.);

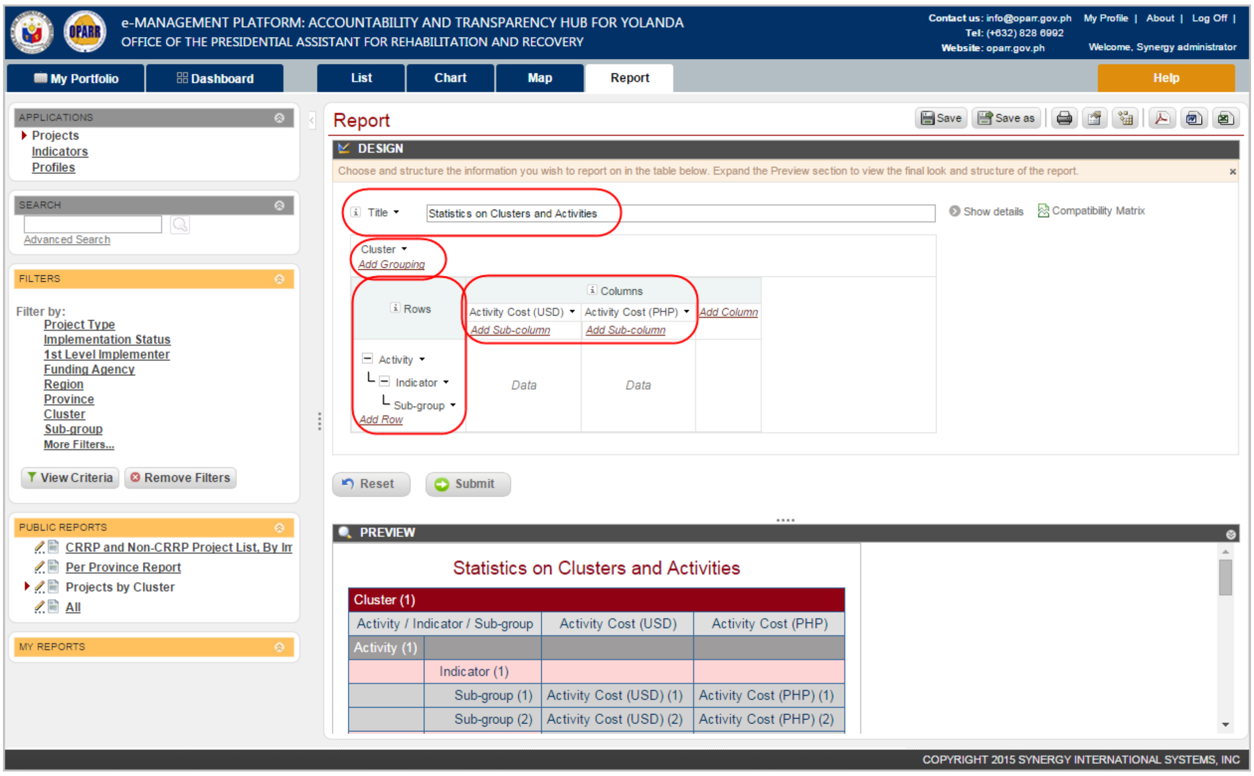


Figure 46: Creating Report 2

You will have the following result (Figure 47):

Statistics on Clusters and Activities

Activity / Indicator / Sub-group	Activity Cost (USD)	Activity Cost (PHP)
Infrastructure		
00001-001 - Extension of causeway		
# of sea ports rehabilitated		
Air and Sea Ports and Communication Facilities	224,114.750	10,000,000.000
00009-001 - New Washington Campus Repair of totally damage SUC bldg./structure		
# of damaged SUC buildings rehabilitated		
Higher Education (Infrastructure)	103,961.450	4,571,185.000
00009-002 - Ibajay Campus Re-construction of totally damage SUC bldgs./structure		
# of damaged SUC buildings rehabilitated		
Higher Education (Infrastructure)	68,160.110	2,997,000.000
00009-003 - New Washington Campus Re-construction of totally damage SUC bldgs./structure		
# of damaged SUC buildings rehabilitated		
Higher Education (Infrastructure)	82,210.600	3,614,800.000
00009-004 - Makato Campus Re-construction of totally damage SUC bldgs./structure		
# of damaged SUC buildings rehabilitated		
Higher Education (Infrastructure)	15,010.230	660,000.000
00009-005 - Makato Campus Repair of partially damage SUC bldg./structure		
# of damaged SUC buildings rehabilitated		
Higher Education (Infrastructure)	8,575.390	377,060.000
00009-006 - Kalibo Campus Repair of partially damage SUC bldg./structure		
# of damaged SUC buildings rehabilitated		
Higher Education (Infrastructure)	44,458.950	1,954,860.000
00009-007 - Banga Campus - Main		
# of damaged SUC buildings rehabilitated		
Higher Education (Infrastructure)	97,083.900	4,268,779.000
00011-001 - Construction of causeway		
# of sea ports rehabilitated		
Air and Sea Ports and Communication Facilities	224,114.750	10,000,000.000
00012-001 - Hamtic Campus Repair of totally damage SUC bldg./structure		
# of damaged SUC buildings rehabilitated		
Higher Education (Infrastructure)	221,742.100	9,750,000.000

Figure 47: Sample List Report 2

11.6 Customising Reports

You can customise the reports by assigning font characteristics to report components, re-ordering rows and columns, etc. The sections below will describe how to customise the reports.

11.6.1 Formatting/Styling Report Components

You may format/style the text entries as well as main report table captions and values by assigning to them value characteristics such as font, font size, font color, background color, alignment (i.e. left, center, or right), etc.

In order to format/style a report component, follow the steps below:

1. Click the report component that needs to be formatted / styled.
2. Select the **Properties** option from the actions list that appears (Figure 48).

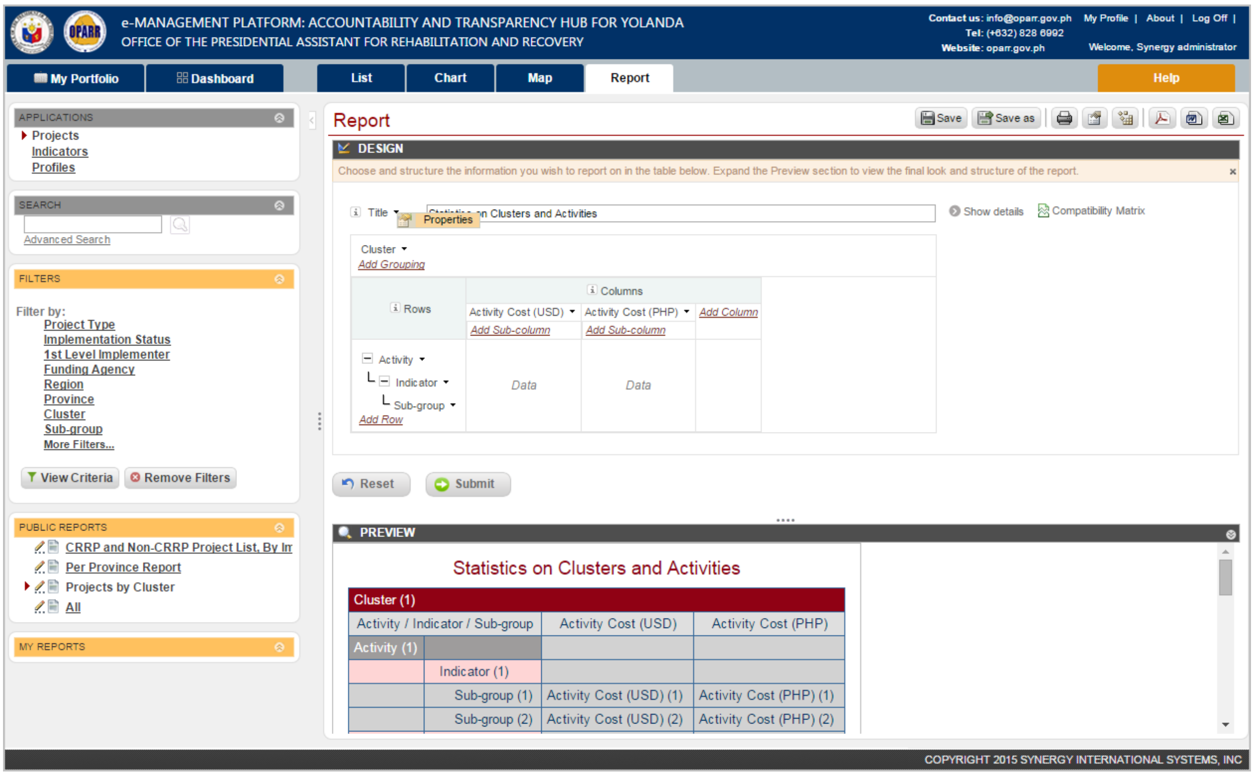


Figure 48: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. Please note that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 49). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics (Figure 51), e.g. sorting order, reference text, etc.

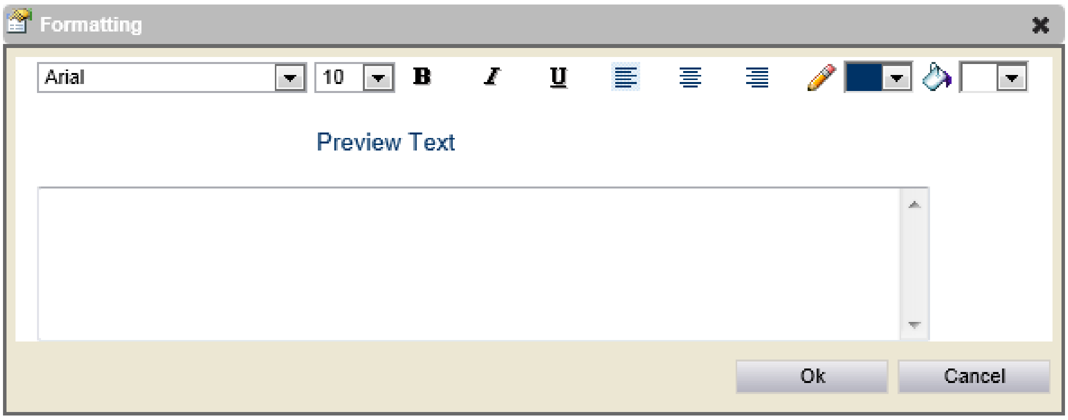


Figure 49: Formatting/Styling Text Entries

3. Change the properties as needed.
   Note: To prevent you navigating away from the section every time when modifying the properties of a different report table component, the *Properties* window allows selecting the next item to be modified. To do that, you need to select the appropriate instance from the *Items* drop-down list in the *Properties* window. The list contains the previously selected report table components.
4. Click the **Apply** button for the changes to take effect. Clicking the **Ok** button will close the window and navigate you to the *Report* module.

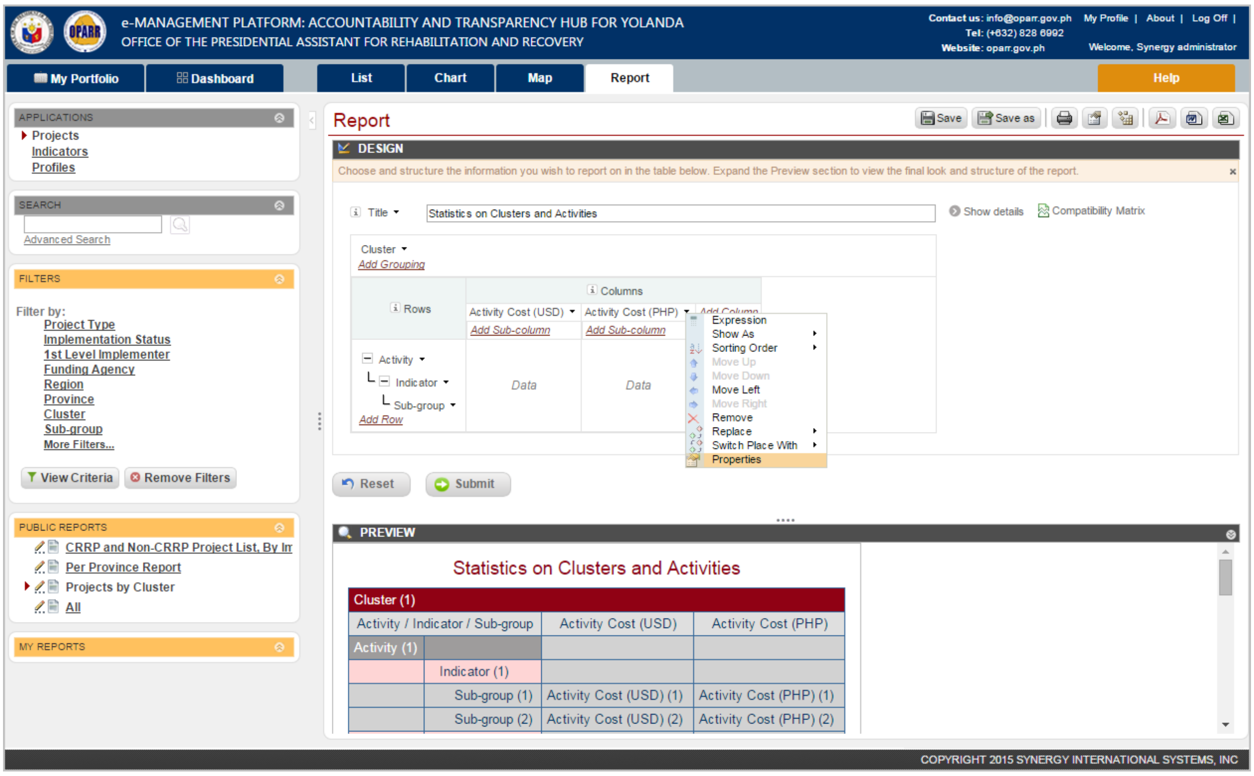


Figure 50: Reports Window with Properties Focus on the Column

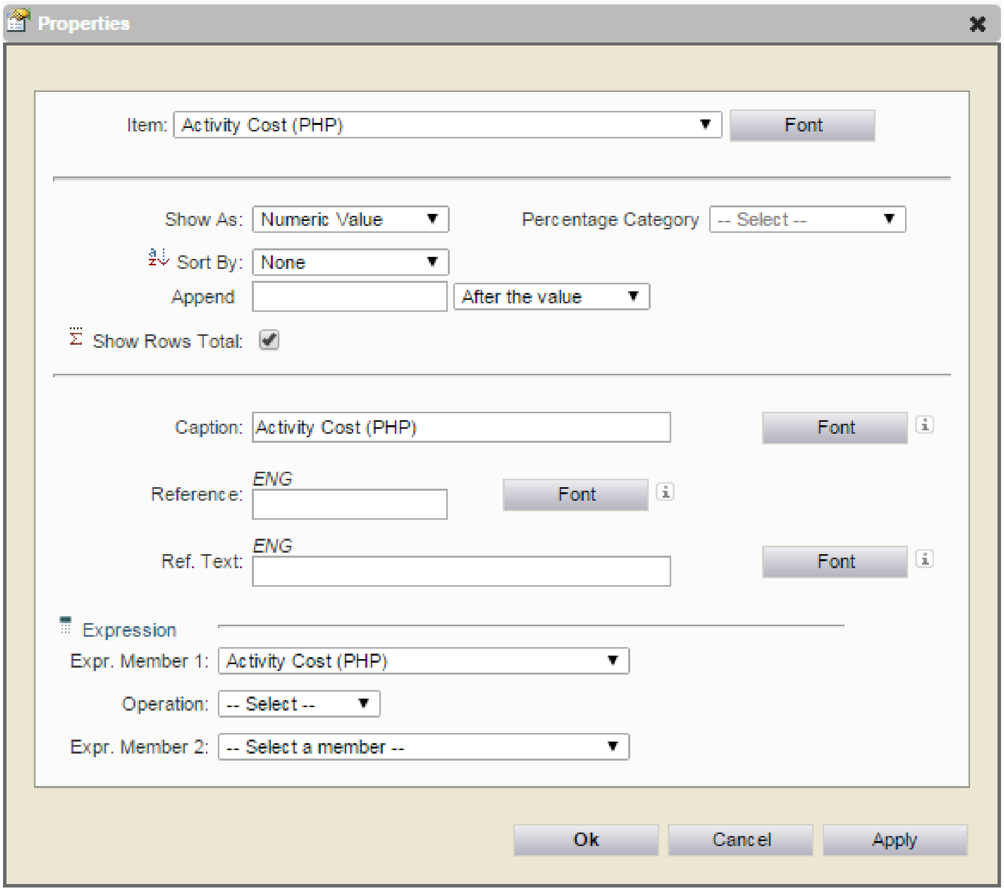


Figure 51: Assigning Properties to Report Table Components

11.6.2 Re-ordering Report Table Components

This option enables the user to establish and modify the order of the report table components, like rows, columns, etc.

In order to re-order report table components, the user should follow the steps described below.

1. Click the component item that needs to be reordered in the report.
2. Select the respective **Move Up / Move Down / Move Right / Move Left** option from the menu that appears. The report generated will maintain the order of the items that was displayed in the *Report Designer* (Figure 52).

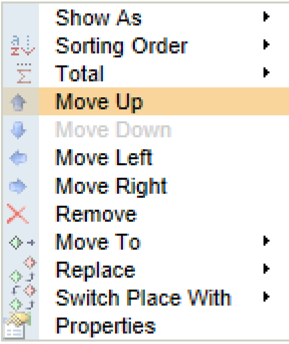


Figure 52: Re-ordering Report Table Components

Note: If any of these actions is not available, the respective option will be disabled in the menu.

11.6.3 Sorting Report Table Components

You may change the order in which the table components will appear in the final report. The report table components can be sorted either in an *Ascending (A-Z)* or a *Descending (Z-A)* order.

In order to alphabetically sort the report table components, follow the steps below:

1. Click the component item for which the sorting order needs to be changed.
2. Select the **Sorting Order** option from the actions list (Figure 53).

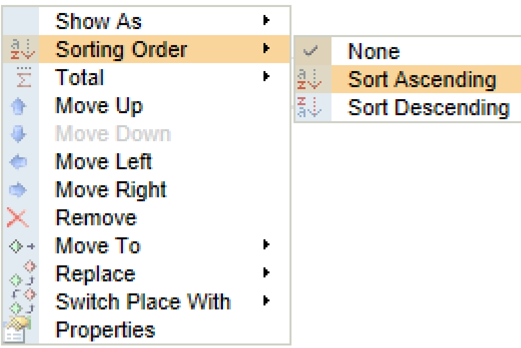


Figure 53: Defining the Sorting Order

3. Define whether the report item values should be sorted in the ascending or descending order. Please note that selecting the **None** option from the list removes

the sorting criteria.

Note: The sorting order for the report components can also be defined from within the *Properties* window.

11.6.4 Removing a Report Table Component

It is possible to remove a report table component from being included in the report, if this is necessary.

In order to remove a report table component, follow the steps below:

1. Click the component item that needs to be removed.
2. Select the **Remove** option from the menu that appears. The selected grouping value will be removed.

11.6.5 Switching Report Table Components

The report table components may be switched between report grouping, rows and columns. If there are sub-columns selected, switching between table groupings / rows and columns is disabled. It is possible to switch between table groupings / rows and sub-columns.

In order to switch report table components, follow the steps below:

1. Click the component item that needs to be switched.
2. Select the **Switch Place With** option from the menu that appears (Figure 54).

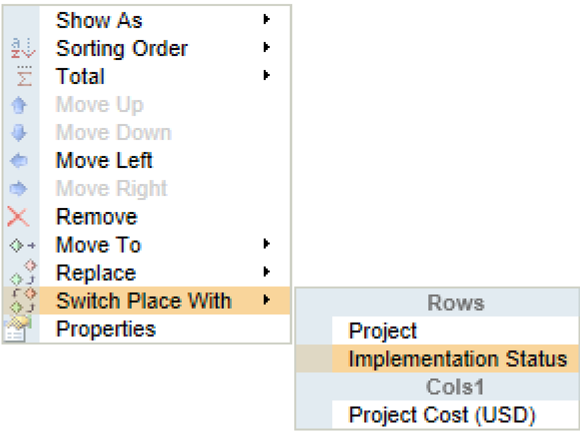


Figure 54: Switching Report Table Components

3. Define what component item the selected instance needs to switch place with. The selected component item will be removed from its current position and added as an item to the specified component. For instance, if it is selected to switch between table grouping and row, the selected table grouping item will be removed from table grouping and added as the row item, while the row item will 'trade' places with the table grouping item.

12. DETAILS SECTION

The *eMPATHY* application has a built-in *Details* section, where you can view detailed information about the items (e.g. projects, indicators, etc.) managed in the application.

The *Details* section can be accessed from the *My Portfolio*, *List*, *Chart*, *Map*, and *Report* modules. In the *Details* section, you can view detailed item information, browse among other items listed under the same parent item, print item details, etc. If you have the corresponding permissions, you can also edit and delete the existing items.

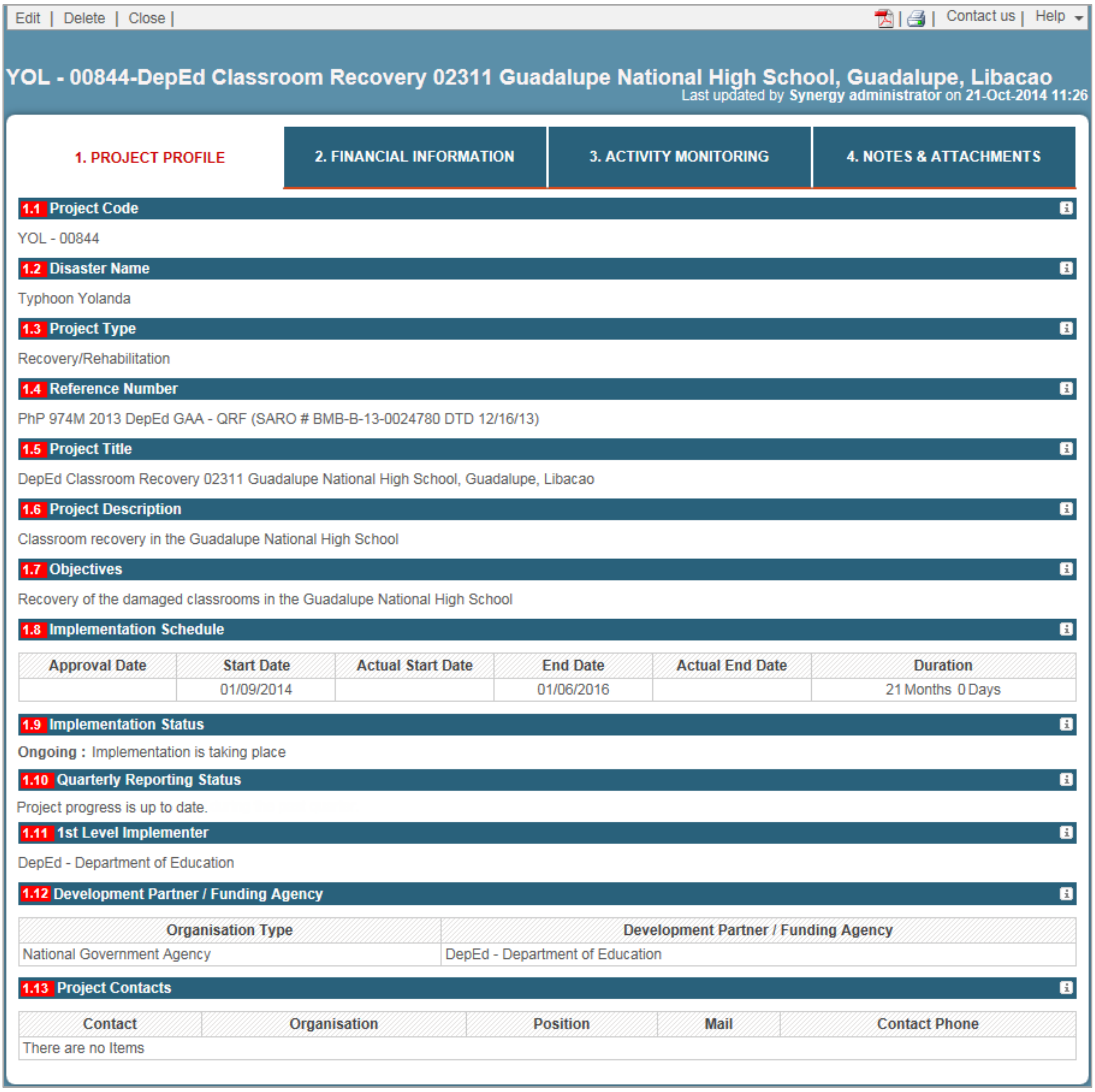


Figure 55: Details Section

12.1 Accessing the Details Section

In order to access the *Details* section, follow the steps below:

1. Access the *Details* section by clicking on the one of the following:

- In the *My Portfolio* module: Click the respective item. You will be directed to the *Details* section (Figure 55).
- In the *List* module: Click the items for the details to be displayed. This will open the *Details* section of the application where more detailed information about the item will be displayed.
  Note: Depending on the list representation settings, additional expanding the list items may be required to reach the item.
- In the *Chart* module: Click the chart for the details to be displayed (e.g., click a relevant bar to see what it consists of). This will open the *Details* section of the application where all items matching the selection will be listed. Click the respective link for the details of the selected item to be displayed. This will open the *Details* section.
- In the *Map* module: Point the mouse cursor on the object on the map. The information window will appear. In order to access the *Details* section, select the **View Details** link. This will open the *Details* section where all items matching the selection will be listed. Click the item name link for the details of the selected one to be displayed.
  Note: You can also choose to view the detailed information on all the projects that are in progress in the given territorial unit by pointing the mouse cursor on the button.
- In the *Report* module: Create a report indicating the item (e.g. Project, etc.) as a value for the report row and click the **Submit** button. For more details on how to create and generate reports, please see Creating a Report. In the report generated, click the respective link.

2. Take the necessary actions (review the provided information, update and improve as needed, print the details, etc.) The **Close** button is used to return to the main screen.

12.2 Browsing Items

If you are accessing the *Details* section from the *Chart* or *Map* modules, you should locate the item that you want to see the details for in the table displayed on the screen and click it to open its details.

To easily locate the item that you are looking for, you can browse among the items in the table. To browse items, use the corresponding page number or **(First)**, **(Previous)**, **(Next)**, and **(Last)** buttons at the bottom of the table.

12.3 Adding a New Item

In the *Details* section, you may add new items (e.g. projects, indicators, etc.) if you have been granted with the appropriate permissions.

In order to add a new item, follow the steps below:

1. Click the **New** button at the top of the *Details* window. The data input window appears which is described in the respective user manual in REFERENCES.
2. Provide the information requested and save it.

12.4 Editing an Existing Item

In the *Details* section, you may also edit those existing items that have been either created by yourself or you have permissions to manage.

In order to edit existing items, follow the steps below:

1. Click the **Edit** button at the top of the *Details* window. The data input window appears which is described in the respective user manual in REFERENCES.
2. Make the appropriate changes in the data input window and save.

12.5 Deleting an Existing Item

In the *Details* section, you may delete those existing items that have been either created by yourself or you have permissions to manage.

In order to delete an existing item, follow the steps below:

1. Locate the item that you want to permanently delete from the application. Please note that deleted items will no longer be available for data analysis and reporting.
2. Click the **Delete** button at the top of the *Details* window.

12.6 Exporting an Existing Item

In the *Details* section, you may export the existing items in the PDF format.

In order to export an existing item, follow the steps below:

1. Click the **Export** button at the top of the *Details* window.
2. Specify whether you want to open or save the exported PDF file.

12.7 Printing an Existing Item

In the *Details* section, you may print out the item details. In order to print out existing item details, click the **Print** button at the top of the *Details* window.

13. CUSTOMISED REPORTING

The *eMPATHY* application allows you to customise the already-created reports in the *List*, *Chart, Map,* and *Report* modules, i.e. to define the way the numeric values can be displayed, their format, the number of the items to be displayed, etc. You may also re-organise the reports in the desired way, i.e. include it into a group of reports or create a new report group for it, rename the report, etc. The *eMPATHY* application can also export the reports to the desired format (Word, Excel, etc.) or print them out.

13.1 Setting Report Options

In the *List* and *Report* modules, you can set the report options, i.e. define whether the numeric values should be displayed in thousands, millions, etc.

In order to set the report options, follow the steps below:

1. Click the **(Set Options)** button in the top toolbar. An *Options* window (Figure 56) will appear.
2. Define the format in which the numeric values should be displayed, i.e. whether the original values should be displayed or they should be shown in thousands, millions, etc. This prevents large numeric values represented by many zeroes from taking a lot of space in the report.
3. Indicate whether empty and unspecified rows should be hidden by selecting the respective checkboxes.

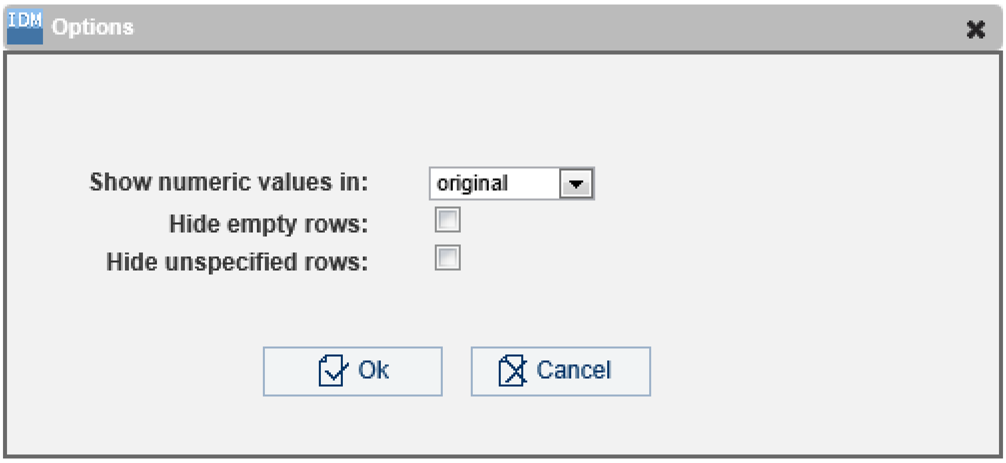


Figure 56: Setting the Chart Report Options

4. After finishing, click the **Ok** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

13.2 Saving Reports

After creating reports of different types, you can save them as pre-defined reports and include them either in the *Public Reports* group and make them available for all users who access application or in the *My Reports* group available to you only.

There are two ways of saving a report in the *eMPATHY* application. You can save a newly-created report, or save a copy of an existing report with a different name, in a different location, or with a different content.

13.2.1 How to Save New Reports

From the *List*, *Chart, Map,* and *Report* modules, you can design an appropriate report and save it.

In order to save the report created, follow the steps below:

1. Click the Save **(Save)** button on the top right side of the screen. A *Memorize Report* window (Figure 57) will appear.
2. Define the report name in the *Memorized Name* field.

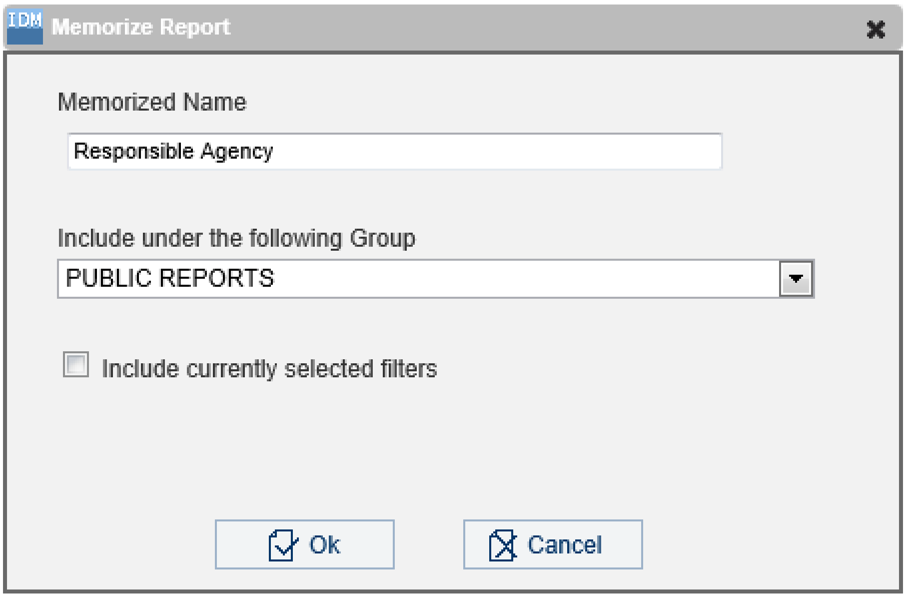


Figure 57: Memorizing a Report

3. Specify the group the report will be included in by selecting the appropriate value from the *Include under the following Group* combo box.
4. Check the *Include currently selected filters* checkbox to save filtering defined along with the report.
5. Click the **Ok** button to save the report for future reference or click **Cancel** to discard the changes made.

13.2.2 How to Save a Copy of the Report

In the *eMPATHY* application, you can save a copy of an existing report. The copy of the report can be saved in a different location, with a different name or edited content.

In order to save a copy of a report, follow the steps below:

1. Click the Save as button on the top right side of the screen. A *Memorize Report* window (Figure 57) will appear.
2. Save the report by the steps described in the section above.

13.3 Re-organising Reports

You can organise the reports in the desired way, i.e. rename the reports, create groups to include reports under, etc.

From the *List*, *Chart, Map,* and *Report* modules, you can design appropriate reports and organise them in the preferred way. In order to organise the reports, click the respective **(Organise Views / Charts / Maps / Reports)** button at the top right side of the screen. An *Organise Reports* window (Figure 58) will appear. You may perform the following actions:

- Renaming Reports and Report Groups
- Deleting Reports or Report Groups
- Adding a Sub-group
- Re-ordering Reports and Report Groups
- Setting a Report as Default

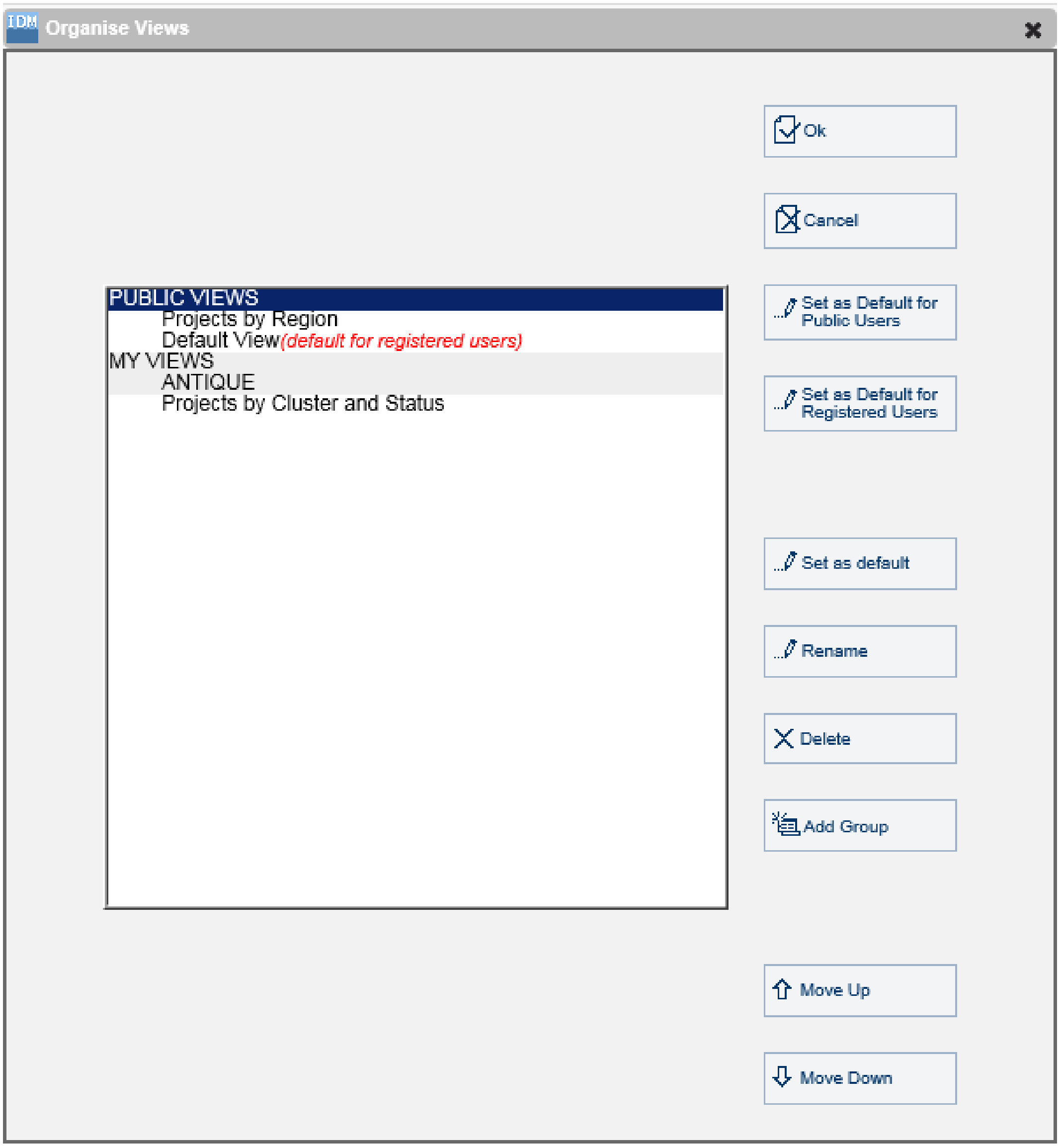


Figure 58: Organising the Reports

13.3.1 Renaming Reports and Report Groups

In order to rename a report / report group, follow the steps below:

1. Highlight the report / report group to be renamed.
2. Click the **Rename** button.
3. Fill in the desired name for the report / report group.
4. Click the **Ok** button to confirm renaming.

Note: *Public Reports* and *My Reports* groups cannot be renamed.

13.3.2 Deleting Reports or Report Groups

In order to delete a report / report group, follow the steps below:

1. Highlight the report / report group to be deleted.
2. Click the **Delete** button.
3. Click the **Ok** button to confirm deletion.

Note: *Public Reports* and *My Reports* groups cannot be deleted.

13.3.3 Adding a Sub-group

In order to add a sub-group, follow the steps below:

1. Click the **Add Group** button.
2. Fill in the desired name for the sub-group.
3. Click the **Ok** button to confirm adding.

13.3.4 Re-ordering Reports and Report Groups

In order to re-order reports / report groups, follow the steps below:

1. Highlight the report / report group the sorting order of which needs to be changed.
2. Click the **Move Up / Move Down** button.

13.3.5 Setting a Report as Default

In order to set a report as default, follow the steps below:

1. Highlight the report to be displayed in the respective module when you access it.
2. Click the **Set as default** button. The selected report will be marked with *(default for me)* option.
3. If you need to set the report as default for public user access, click the **Set as Default for Public Users** button. The selected report will be marked with *(default for public users)* option.
4. If you need to set the report as default for registered users, click the **Set as Default for Registered Users** button. The selected report will be marked with *(default for registered users)* option.

Note: This option is available only in the *List*, *Chart*, and *Map* modules.

13.4 Viewing Pre-defined Reports

In the *List*, *Chart*, *Map*, and *Report* modules, you can view the pre-defined reports stored under **Public Views/Charts/Maps/Reports** or **My Views/Charts/Maps/Reports** section (see *Main Menu Bar* description in eMPATHY ANALYTICAL INTERFACE STRUCTURE) for data analysis and comparison. For this purpose, select the report to display and click one of the following **Generate Report** buttons to the left of the report name:

- - in the *List* module;
- - in the *Chart* module;
- - in the *Map* module;
- - in the *Report* module.

The selected report will open in the application window (*List, Chart,* and *Map* modules) or a new window (*Report* module). The same results can be achieved if you click the report name.

13.5 Editing Pre-defined Reports

To save you the time and the effort of structuring a report from the scratch when it is necessary to introduce some modifications in any of the pre-defined reports stored under **Public Reports** or **My Reports**, the *Edit* option has been designed in the *Report* module.

In order to edit reports, click the **(Edit)** button to the left of the report to edit. The selected report structure will be loaded in the application window giving you the possibility of formatting and styling it in the desired way. For more details on how to apply formatting to the reports, see Customising Reports.

The pre-defined *List, Chart* and *Map* reports stored in **Public Views/Charts/Maps** or **My Views/Charts/Maps** can also be edited after you have selected to view them (see Viewing Pre-defined Reports). Once the selected report is loaded in the application window, make the appropriate changes and save them. If you wish to keep the modifications, do not forget to save the modified report, see Saving Reports.

13.6 Exporting Reports

From the *Chart, Map,* and *Report* modules, you can design appropriate reports and export them in the PDF, MS Word and MS Excel formats.

In order to export the reports in the PDF, MS Word and MS Excel formats, follow the steps below:

3. Click the respective **(Export in PDF Format)** / **(Export in MS Word Format)** / **(Export in MS Excel Format)** button. A separate window will open.
4. Make changes, if necessary.

13.7 Printing Reports

From the *Chart, Map,* and *Report* modules, you can design appropriate reports and print them out.

In order to print out the selected report, follow the steps below:

1. Click the **(Print)** button on the top toolbar in the right side of the screen. A separate window will open.
2. Select the **Print** option.

14. FILTERING

The system allows for data filtration. Filtering is used to narrow down the information displayed in the reports. The filtration works in the Step-by-Step technology, which is used to implement new filtering over the results of the previous one. This option reduces the size of reports and makes them easier to read. Filters can be added to new or existing reports. Defined filtering is applicable for list, charts, and reports.

The list of the most frequently-used filter categories is displayed under the *Filters* section. The list of all available filter categories is displayed when you click the **More Filters** link.

14.1 Creating Filtering Criteria

In order to create filtering criteria, follow the steps below:

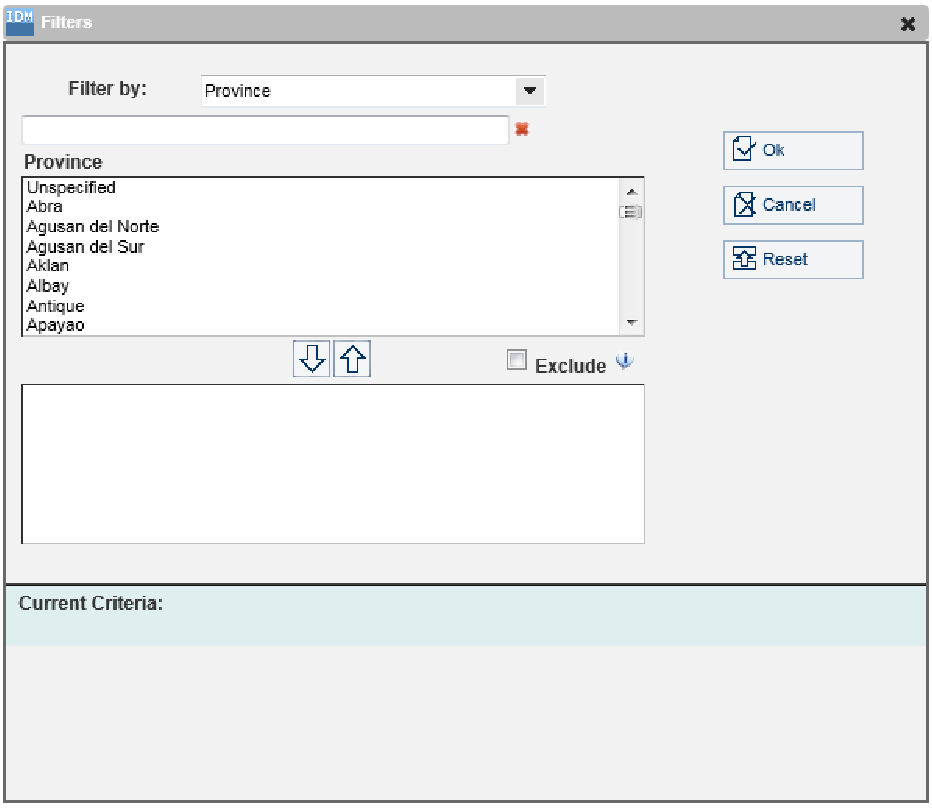


Figure 59: Filters

1. Click the hyperlink under the *Filters* section that represents the *Category* according to which the filtering will be carried out. A *Filters* window (Figure 59) will appear having the *Category Item* pull down menu set to the selected *Category*. The first text area holds a list of all the available *Category* items that the report could display, whereas the second text area holds a sub-set list of the first one. You may only edit the sub-set list in the second text area. At the end of the filtering, if the sub-set list is empty, all the *Category* items will be included in the report. If, however, the sub-set is non-empty, only the items in the sub-set list will be included in the report. At the bottom of the pop-up window the selection criteria from all categories are presented. This view is also available by clicking the View Criteria button.

2. Select a *Category* item from the list in the first text area.
   Note: To make it easier to locate the appropriate category item in the long list, the *Filters* window has a search capability. To find the relevant category item, you can enter any combination of letters in the search field. The list of all category items matching the criteria will be displayed in the first text area (Figure 60). To remove the search criteria, use the ✖ **(Delete)** button to the right of the search field.
3. Click the downward-pointing arrow button to add the item selected to the list in the second text area (Figure 61).
4. Repeat steps 2 and 3 to add more than one *Category* item.
   Note: If a *Category* item needs to be removed from the second text area, select it from the list in the second text area and click the upward-pointing arrow button.
5. Click the **Ok** button to apply the filtering to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List or Chart). The system will regenerate and download, to the client's side, an updated report that applies the updated filtering criteria.

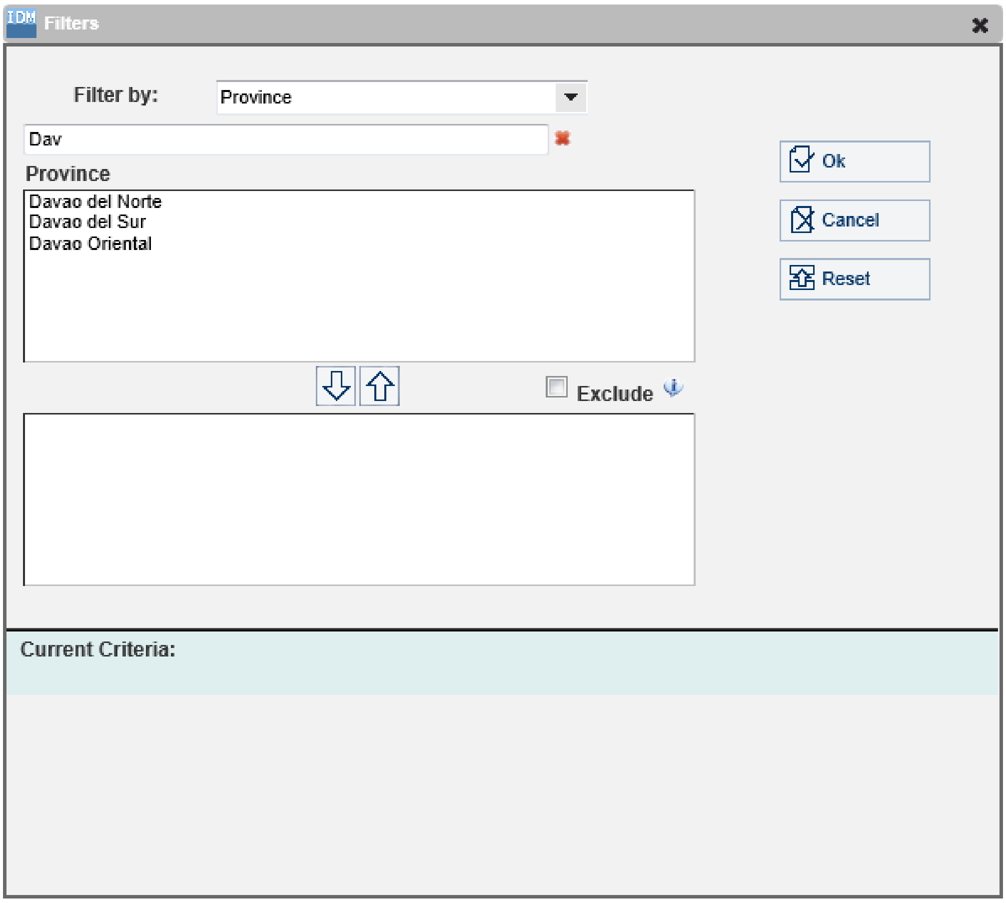


Figure 60: Searching for a Category Item

Note: It is possible to exclude a *Category* item(s) from being included into the filtering criteria to be created. In this case, click the *Exclude* checkbox. All the *Category* items that appear in the second text area will be excluded from the filtering criteria to be created.

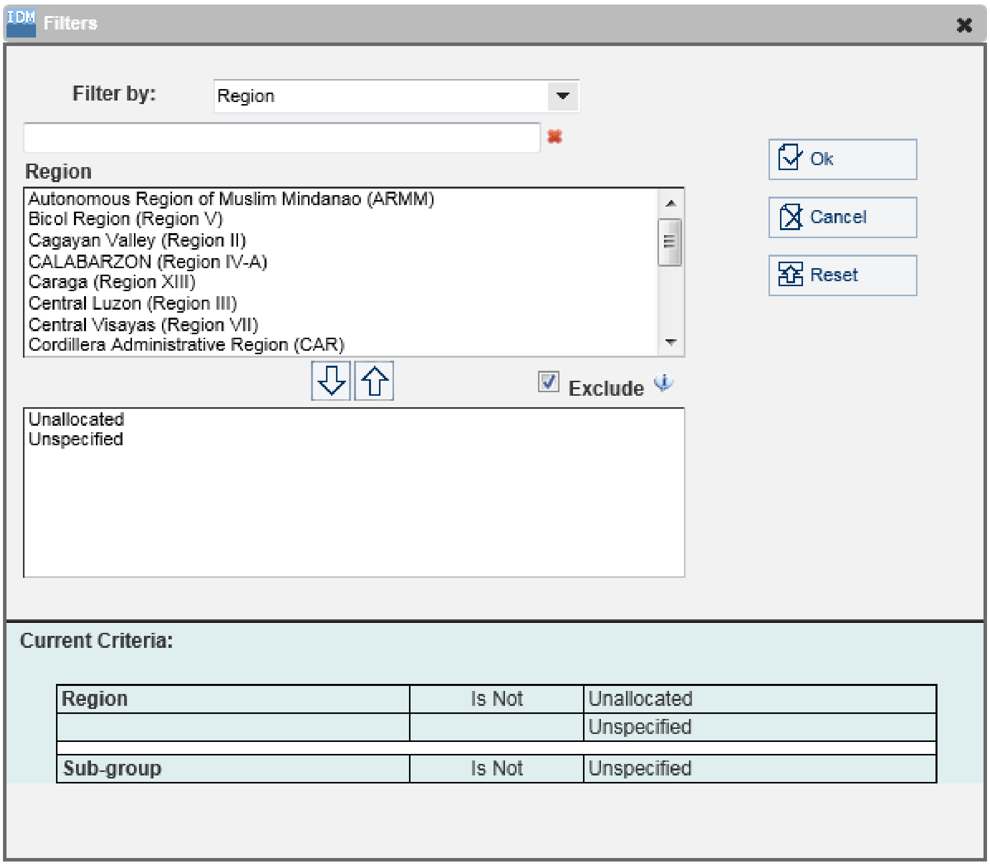


Figure 61: Creating Sample Filtering Criteria

14.2 Sample Filtering Criteria

If the **Region** and **Sub-group** have been selected as filtering categories and items with the **Unallocated** and **Unspecified** values have been excluded from being incorporated in the report data (Figure 61), the following results will be acquired (Figure 62).

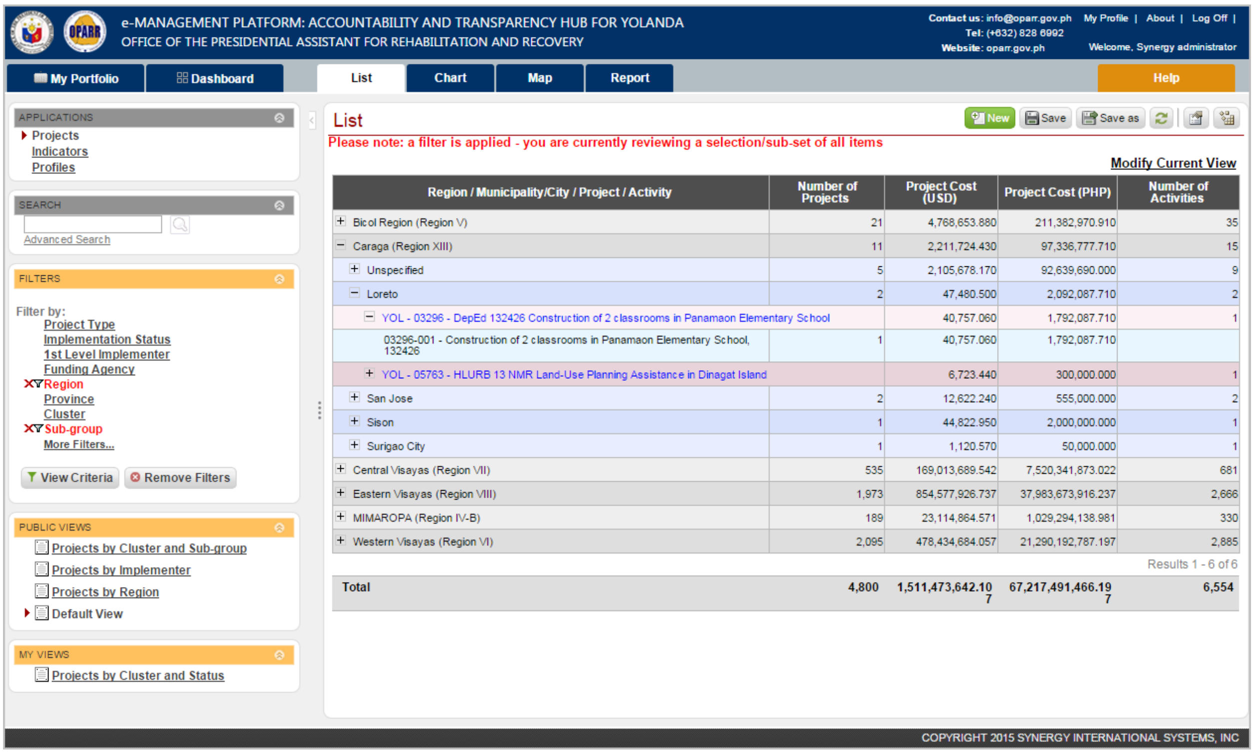


Figure 62: Filtered List

15. SEARCH

The *eMPATHY* application is equipped with a comprehensive search mechanism, which allows searching for any relevant information.

15.1 Simple Search

The simple search interface is available to find any relevant information quickly and easily within the integrated *eMPATHY* content. Simple search implies that you can type search operators directly into the search box.

15.2 Advanced Search

In addition to providing easy access to the content, the *eMPATHY* application has a number of specific features that is used to find exactly what is looked for. One of these features is advanced search that allows setting different complex conditions using the *Advanced Search* form. It gives several additional fields which may be used to qualify searches by organisations involved into the project implementation, regions where the projects are implemented, etc.

In order to create search criteria, follow the steps below:

1. Click the **Advanced Search** link under the *Search* section. The *Advanced Search* form appears (Figure 63).

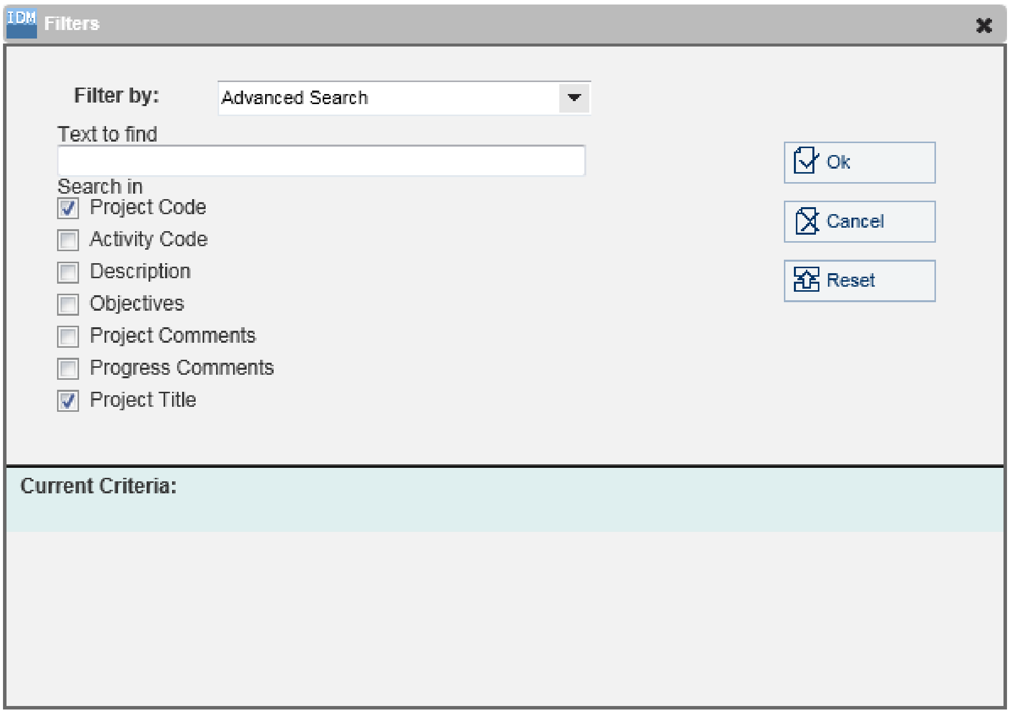


Figure 63: Advanced Search Section

2. Define the text to search for in the appropriate field.
3. Specify the fields to look in by selecting the appropriate checkbox(es).
4. Click the **Ok** button to apply the search criteria to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List or Chart).

15.3 Sample Search Criteria

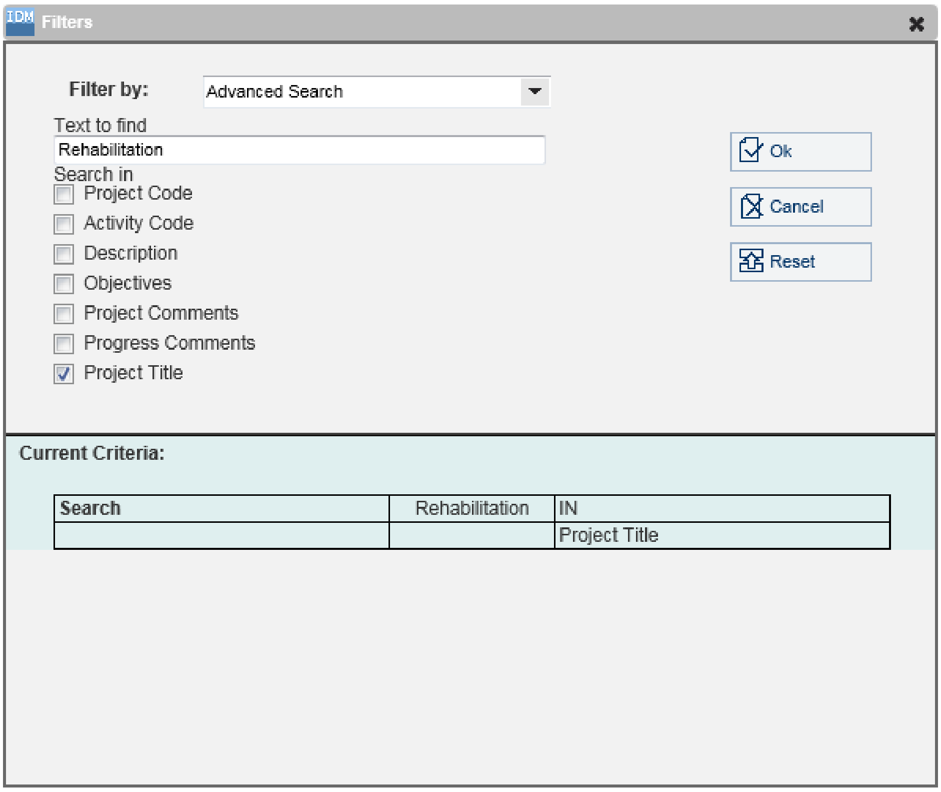


Figure 64: Creating Search Criteria

If you have selected to search for **Rehabilitation** among project titles (Figure 64), the following search results will appear (Figure 65).

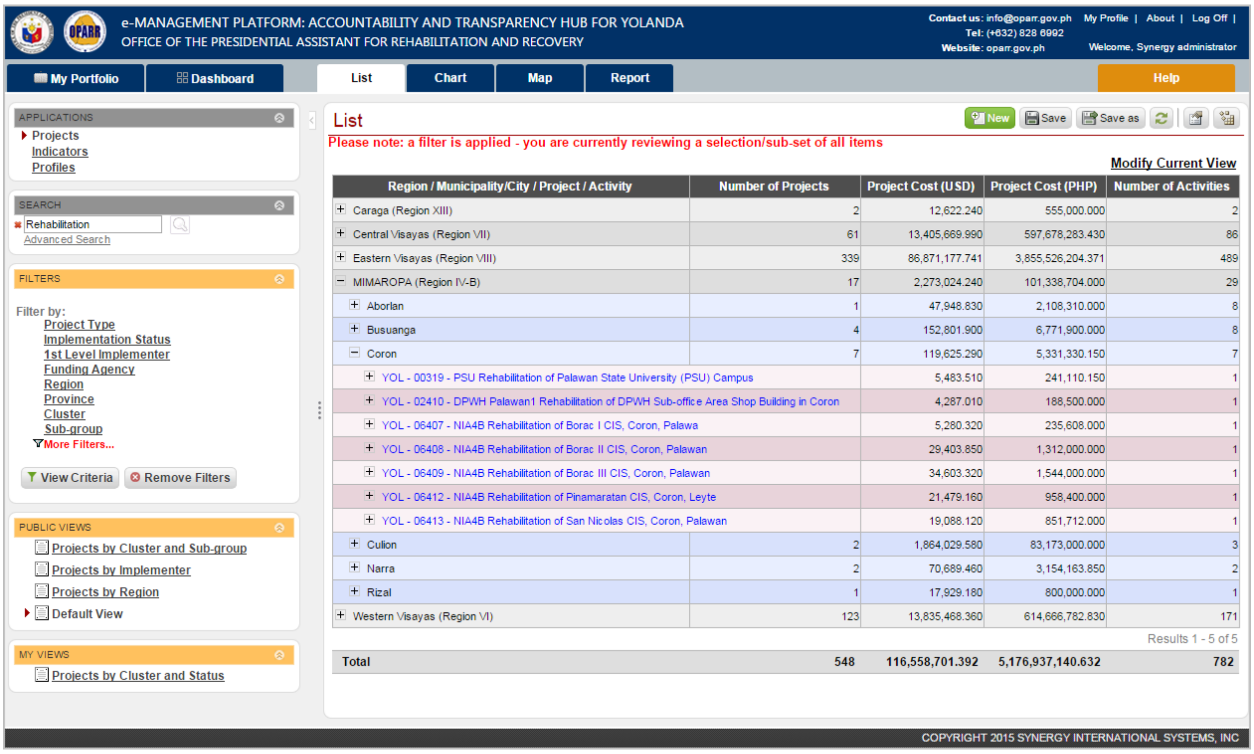


Figure 65: Search Results

16. LOGGING OUT

Once you have finished using the *eMPATHY* application, it is necessary to terminate the session and log off. In order to log off from the application, press the **Log Off** link in the upper right corner of the application window.

17. REFERENCES

Please refer to the following eMPATHY related documents:

- eMPATHY Projects Application User Manual
- eMPATHY Indicators Application User Manual
- eMPATHY Organisation Profile User Manual
- eMPATHY Cluster Profile User Manual
- eMPATHY Administration Center User Manual